

Adding a Visit

When adding a visit to the database, there are two types of households: 1. New household (they have not visited a food pantry that uses the database, so do not have a record in the system) and 2. Existing household (they have previously visited your pantry or another pantry). Both visit types start with searching for the individual in the database.

Searching for an Individual

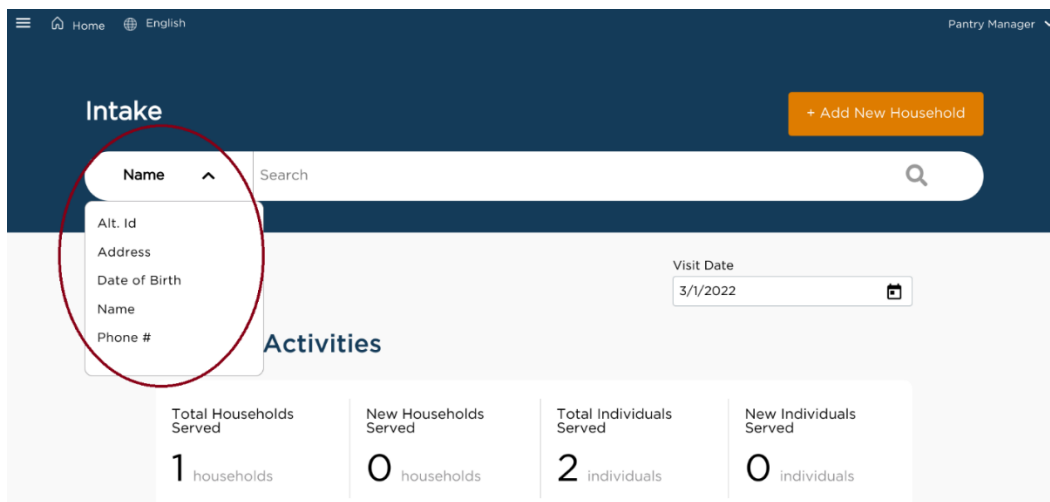
To determine if an individual is already in the system, you may search by different fields. The search bar is located in the middle of the Home Screen.

The most common search is by name. Start by typing the neighbor's last name into the search bar. A list of all potential matches will appear. If you would like to narrow your search instead type the first three letters of the neighbor's last name, followed by a comma, then a space then the first three letters of their last name, then hit enter. Alternatively, you may search using the full name, with the format *last name, first name*.

A neighbor may also present a Great Plains Food Bank barcode card, which is connected to their record in the database. To find their information using the card, select "Alt. id" from the search options. You may enter the number on the back of the card into the search bar, or click the barcode icon in the search bar and scan the card using the chromebook's camera.


Additionally, you may search by:

- Street address (e.g. 5 Test Dr.)
- Date of birth (MM-DD-YYYY; MM/DD/YYYY; MM.DD.YYYY; or MMDDYYYY)
- Phone number (123-123-4444; 1231234444; or the last four digits, e.g. 4444)




The screenshot shows the 'Intake' screen of the Great Plains Food Bank system. At the top, there is a navigation bar with 'Home', 'English', and 'Pantry Manager' options. The main header area is dark blue and contains the word 'Intake' on the left and a '+ Add New Household' button on the right. Below this is a search bar with a dropdown menu currently open, showing search options: 'Name', 'Alt. Id', 'Address', 'Date of Birth', 'Name', and 'Phone #'. The search bar itself contains the text 'Search' and a magnifying glass icon. To the right of the search bar is a 'Visit Date' field with the value '3/1/2022' and a calendar icon. Below the search bar, the main content area is titled 'Activities' and displays four statistics in a grid format:

Statistic	Value	Unit
Total Households Served	1	households
New Households Served	0	households
Total Individuals Served	2	individuals
New Individuals Served	0	individuals

After you have selected your search option and entered the neighbor's information, a list of potential matches will generate. Click the plus sign  to the left of the neighbor's name to view additional information about the household. If you believe you have found the correct record, you may ask the neighbor for their address for verification.

Search Results

1 results for "Roo, ted"

Name	Last Visit	Phone	DOB	
 Teddy Roosevelt 275 Broadway	2/16/2022	7011234567	10/27/1958	Add Visit

Alt ID # **AQ101852**

Address **275 Broadway
Medora, ND 58645**

Household members **Alice Roosevelt**

Proxy Preferred Language

Notes [More Notes](#) [Edit/View Household Info](#)

Mark as duplicate

Recent Visit History [View Full History](#)

Once you confirm you have the correct record, click the orange "Add Visit" button and proceed to the [Adding a Visit – Existing Household](#) section.



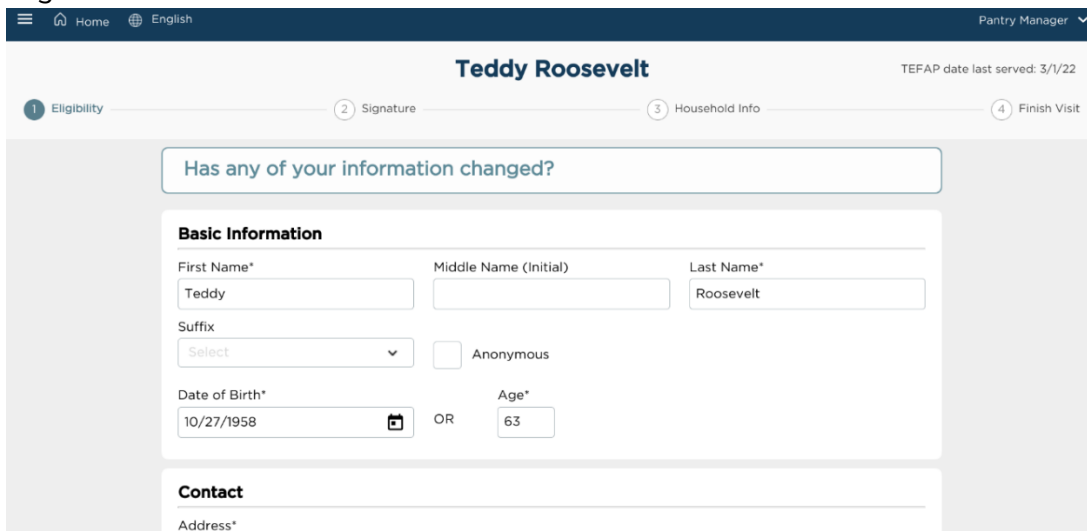
If you do not find the neighbor, click the orange "+Add New Household" button at the top of the screen and move to the [Adding the Visit – New Household](#) section.



Adding the Visit – Existing Household

After you click “Add Visit” you will be taken through four different tabs – 1. Eligibility; 2. Signature; 3. Household Info; and 4. Finish Visit.

1. Eligibility. This tab reviews the household information that is required by the USDA The Emergency Food Assistance Program (TEFAP). Since the neighbor has already been entered into the system, their information will be populated in each field. If there are any changes to this information, simply type over the existing information or select the updated response (for questions that use radio buttons or check boxes). Once you proceed through this screen, click the orange “**Save and Continue**” button.



2. Signature. This tab allows the neighbor to provide their signature, attesting they are in need of food assistance. The neighbor needs to sign once each year, per the North Dakota Department of Public Instruction. From the “Signee” drop down, select the household member who will sign. Next ask the neighbor to type their initials into the “Typed Initials” box. Then click the orange “**Save and Continue**” button. If the system indicates the neighbor has already signed for the year, simply click the “**Save and Continue**” button.

I certify that I have willingly shared the information above, meet the monthly income guidelines, and/or am in need of food assistance.

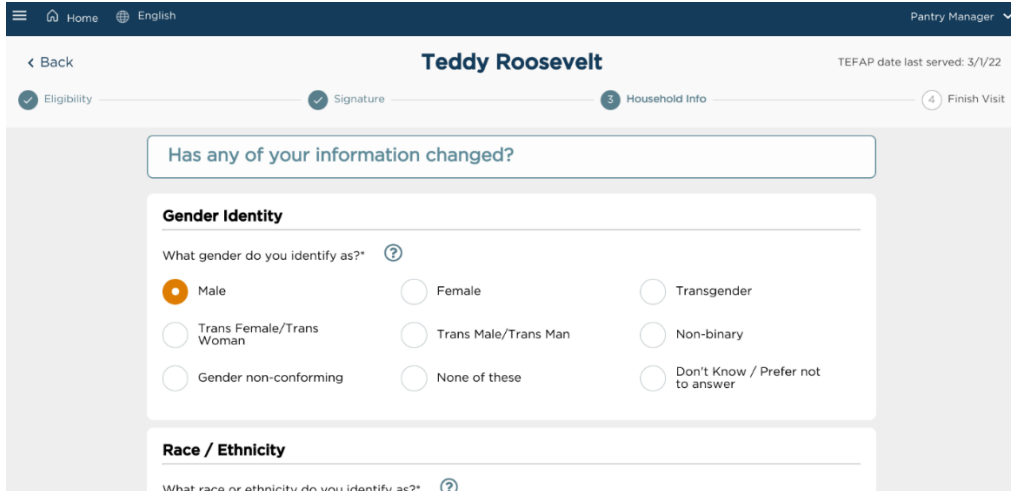
Signee* Date

Teddy Roosevelt 3/1/2022

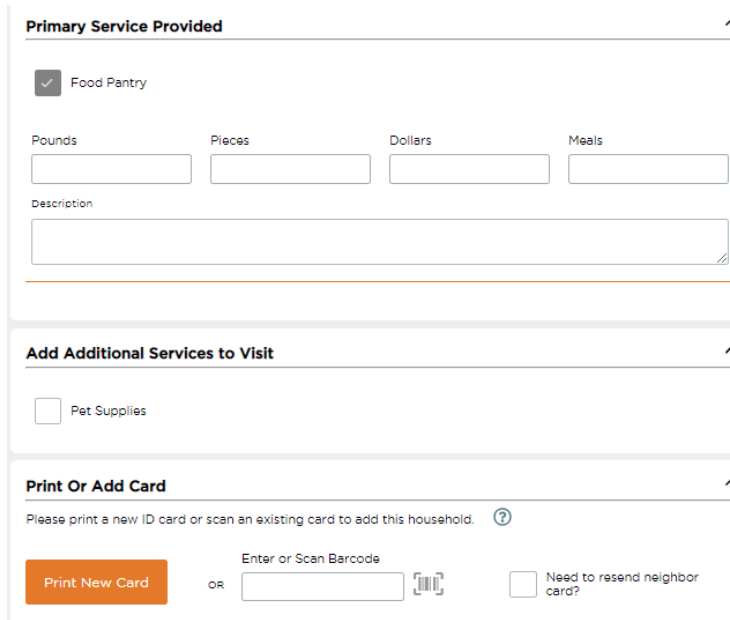
Signature Type* Typed Initials*

Typed Initials TR

3. Household Info. This tab contains additional household information. Although it is unlikely that this information will change, you may again make any needed changes by selecting the updated radio button or check box. Once you proceed through this screen, click the orange “Save and Continue” button.



4. Finish Visit. On this page, your pantry may utilize any of the optional fields. To add the **pounds** provided during the visit, input the number in the “Pounds” box. If your pantry offers **additional services**, select the corresponding box. You may also **assign a barcode card** on this screen. You may enter the code on the back of the card into the box under “Enter or Scan Barcode.” Alternatively, you may click the barcode icon, then scan the card, using the chromebook’s camera.



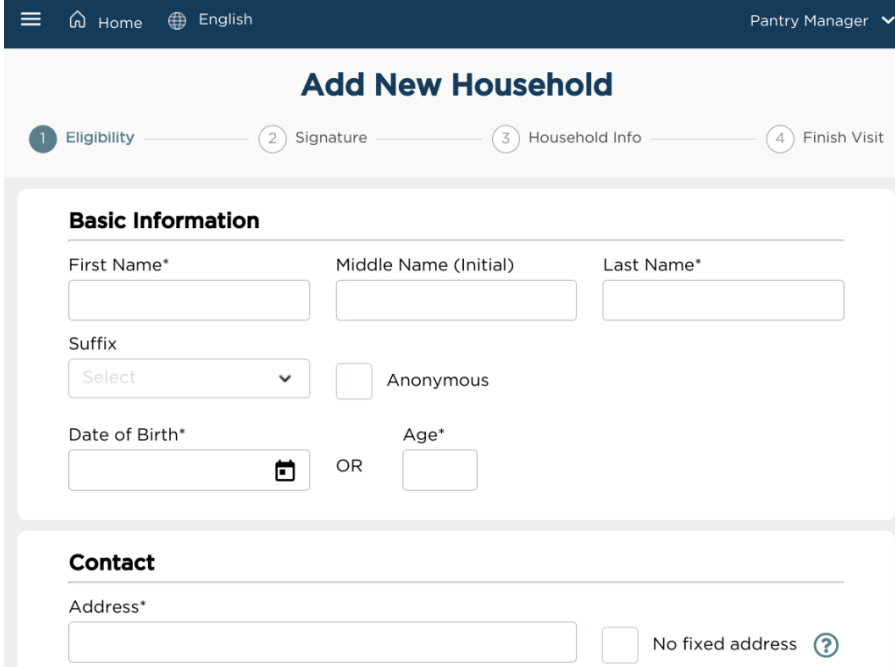
Once you proceed through this screen, click the orange “Finish” button.

Finish

Adding a Visit – New Household

After you click “+Add New Household” you will be taken through four different tabs – 1. Eligibility; 2. Signature; 3. Household Info; and 4. Finish Visit.

1. Eligibility. This tab walks through the neighbor’s basic information, most of which is required by the USDA The Emergency Food Assistance Program (TEFAP). Move through the screen, asking the neighbor for the corresponding information. Any field with an asterisk (*) next to it is required and must be completed in order to move to the next screen. Once you have completed filling out the information, click the orange “**Save and Continue**” button.



The screenshot shows the 'Add New Household' form with a progress indicator at the top showing four steps: 1. Eligibility (active), 2. Signature, 3. Household Info, and 4. Finish Visit. The 'Basic Information' section includes fields for First Name*, Middle Name (Initial), and Last Name*. Below these are a Suffix dropdown menu, an 'Anonymous' checkbox, a Date of Birth* field with a calendar icon, and an 'Age*' field with an 'OR' option between them. The 'Contact' section has an Address* field and a 'No fixed address' checkbox with a help icon.

2. Signature. This tab allows the neighbor to provide their signature attesting they are in need of food assistance. From the “Signee” drop down, select the household member who will sign. Then ask the neighbor to type their initials into the “Typed Initials” box. Then click the orange “**Save and Continue**” button.

I certify that I have willingly shared the information above, meet the monthly income guidelines, and/or am in need of food assistance.

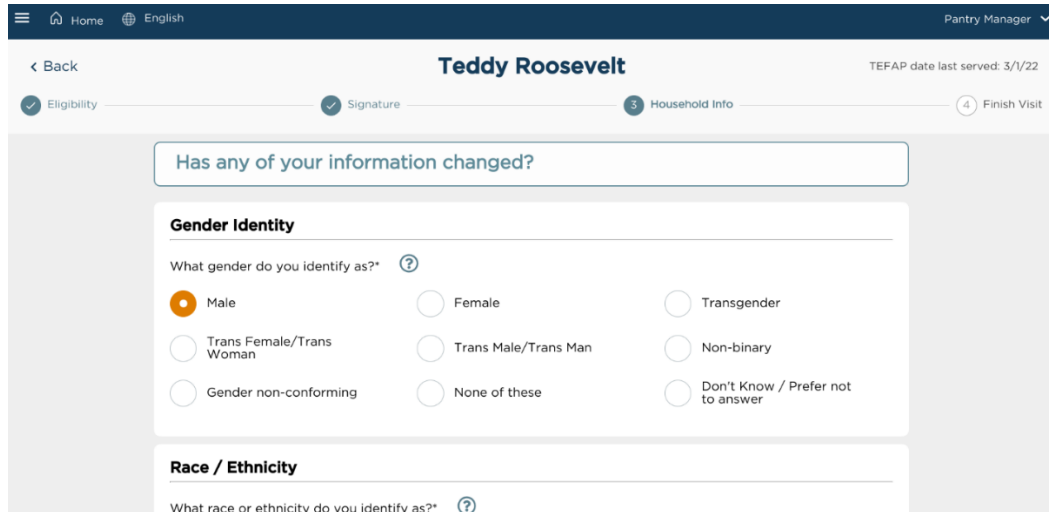
Signee* Date

Teddy Roosevelt 3/1/2022

Signature Type* Typed Initials*

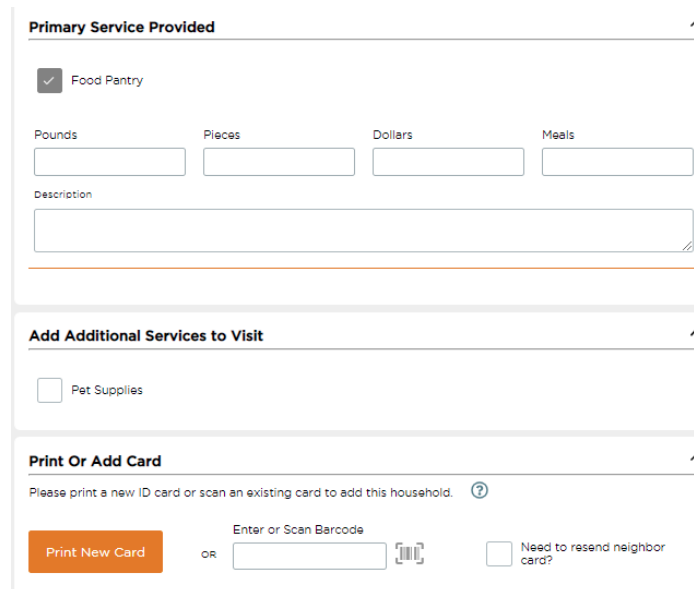
Typed Initials TR

3. Household Info. This tab contains additional household information. Ask the neighbor for all of the required information, as denoted by the asterisk (*). Once you proceed through this screen, click the orange **“Save and Continue”** button.



The screenshot shows a mobile application interface for 'Teddy Roosevelt'. At the top, there's a navigation bar with 'Home', 'English', and 'Pantry Manager'. Below that, a progress indicator shows four steps: 'Eligibility' (checked), 'Signature' (checked), 'Household Info' (active), and 'Finish Visit'. The main heading is 'Teddy Roosevelt' with a sub-heading 'TEFAP date last served: 3/1/22'. A question box asks 'Has any of your information changed?'. Below this are two sections: 'Gender Identity' and 'Race / Ethnicity'. The 'Gender Identity' section asks 'What gender do you identify as?' and has radio buttons for Male (selected), Female, Transgender, Trans Female/Trans Woman, Trans Male/Trans Man, Non-binary, Gender non-conforming, None of these, and Don't Know / Prefer not to answer. The 'Race / Ethnicity' section asks 'What race or ethnicity do you identify as?'.

4. Finish Visit. On this page, your pantry may utilize any of the optional fields. To add the **pounds** provided during the visit, input the number in the “Pounds” box. If your pantry offers **additional services**, select the corresponding box. You may also **assign a barcode card** on this screen. You may enter the code on the back of the card into the box under “Enter or Scan Barcode.” Alternatively, you may click the barcode icon, then scan the card, using the chromebook’s camera.



The screenshot shows the 'Finish Visit' screen. It has three main sections: 'Primary Service Provided', 'Add Additional Services to Visit', and 'Print Or Add Card'. The 'Primary Service Provided' section has a checked checkbox for 'Food Pantry' and four input boxes for 'Pounds', 'Pieces', 'Dollars', and 'Meals'. Below these is a 'Description' text area. The 'Add Additional Services to Visit' section has an unchecked checkbox for 'Pet Supplies'. The 'Print Or Add Card' section has a 'Print New Card' button, an 'OR' label, an 'Enter or Scan Barcode' input box with a barcode icon, and a checkbox for 'Need to resend neighbor card?'.

Once you proceed through this screen, click the orange **“Finish”** button.

