

Quick Click

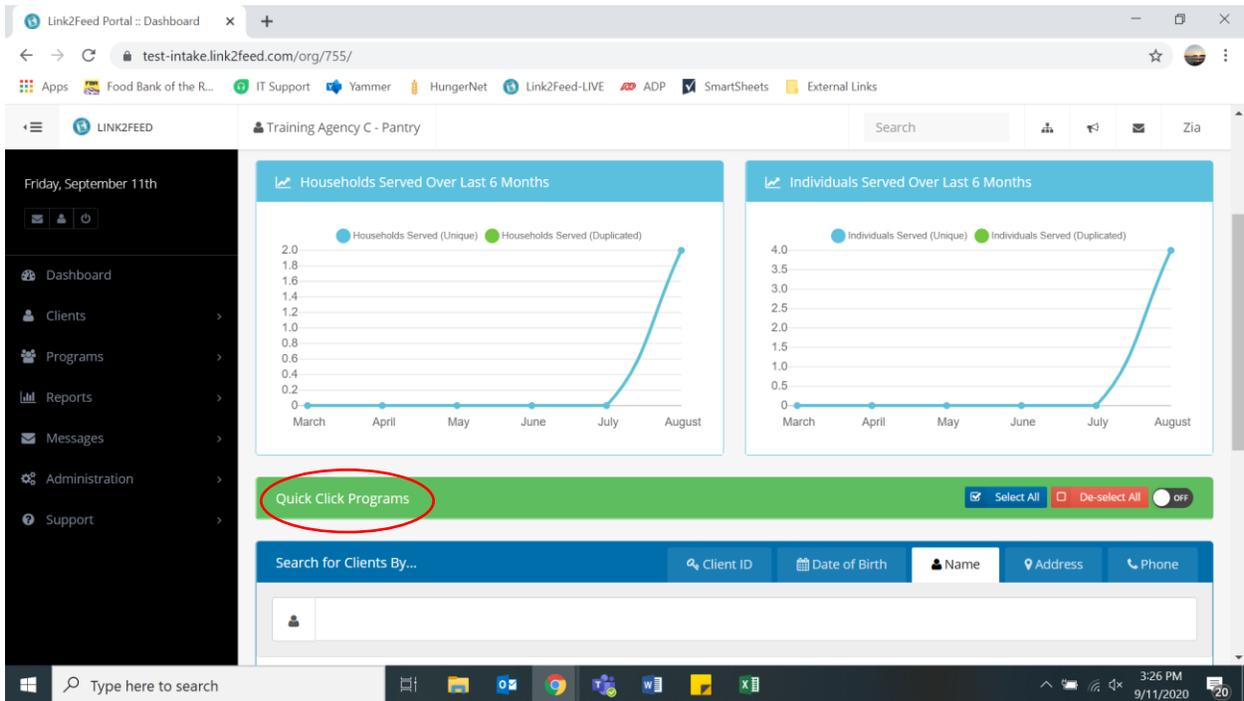
Quick Click is a free feature of Link2Feed that allows Intake Users to more easily check clients into programs.

It can be activated for your organization by emailing L2F@foodbankrockies.org.

More information can also be found at: <https://www.youtube.com/watch?v=KyX9uWqOEz0>

or <https://link2feed.atlassian.net/wiki/spaces/UserManual/pages/719028573/Quick+Click>

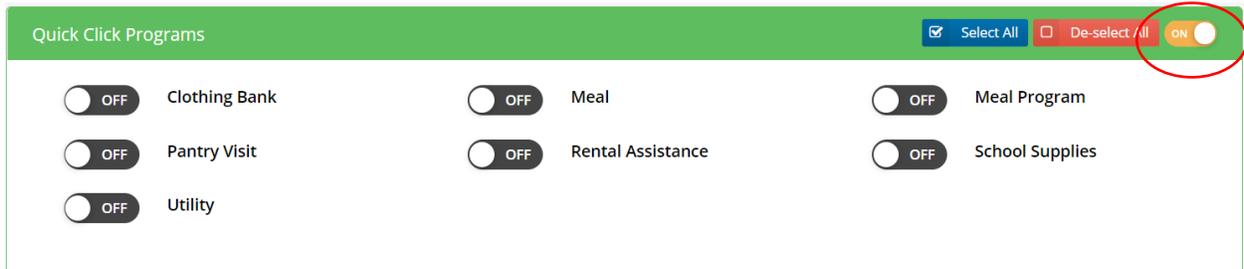
1. In order to activate, please first email L2F@foodbankrockies.org
2. Once the Quick Click feature is activated, a green bar will appear on your User dashboard



The screenshot shows the Link2Feed Portal dashboard for Training Agency C - Pantry. The dashboard includes two line charts: 'Households Served Over Last 6 Months' and 'Individuals Served Over Last 6 Months'. Both charts show a sharp increase in August. Below the charts, a green bar labeled 'Quick Click Programs' is highlighted with a red circle. To the right of this bar are buttons for 'Select All', 'De-select All', and a toggle switch currently set to 'OFF'. Below the green bar is a search bar for clients with filters for Client ID, Date of Birth, Name, Address, and Phone.

3. To turn on this feature, toggle the OFF button to ON (top left).

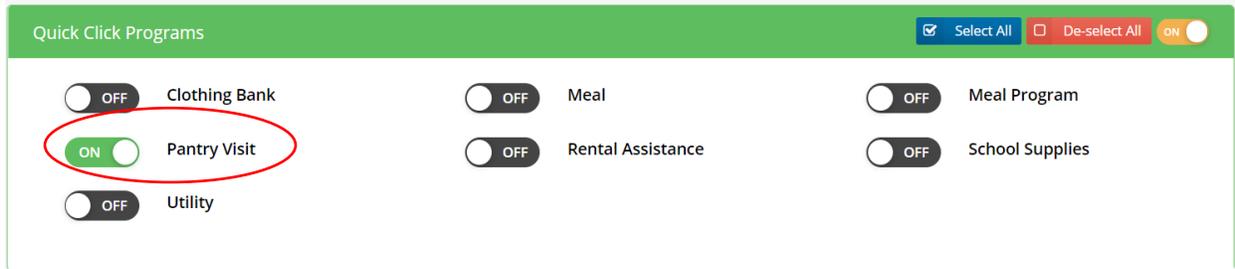
If you do not want to record a client search as a visit, make sure this is toggled off.



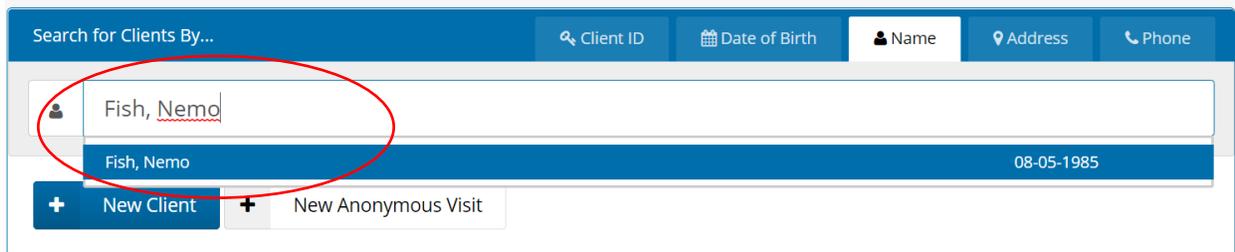
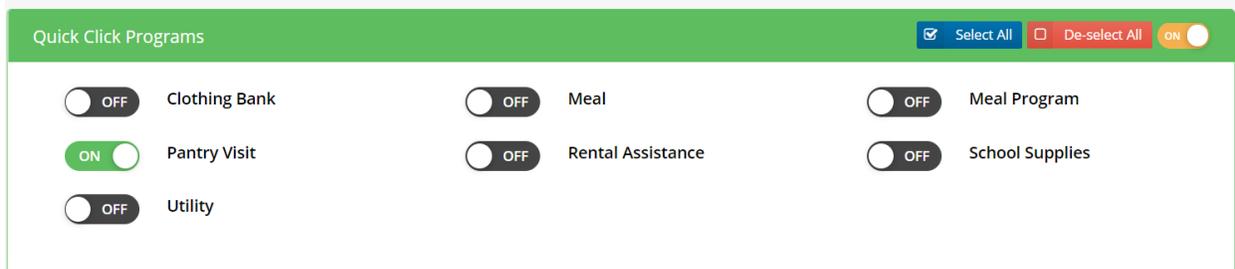
The screenshot shows the 'Quick Click Programs' interface. At the top right, there are buttons for 'Select All', 'De-select All', and a toggle switch currently set to 'ON', which is highlighted with a red circle. Below this, there are several program categories, each with a toggle switch set to 'OFF':

<input type="checkbox"/> OFF	Clothing Bank	<input type="checkbox"/> OFF	Meal	<input type="checkbox"/> OFF	Meal Program
<input type="checkbox"/> OFF	Pantry Visit	<input type="checkbox"/> OFF	Rental Assistance	<input type="checkbox"/> OFF	School Supplies
<input type="checkbox"/> OFF	Utility				

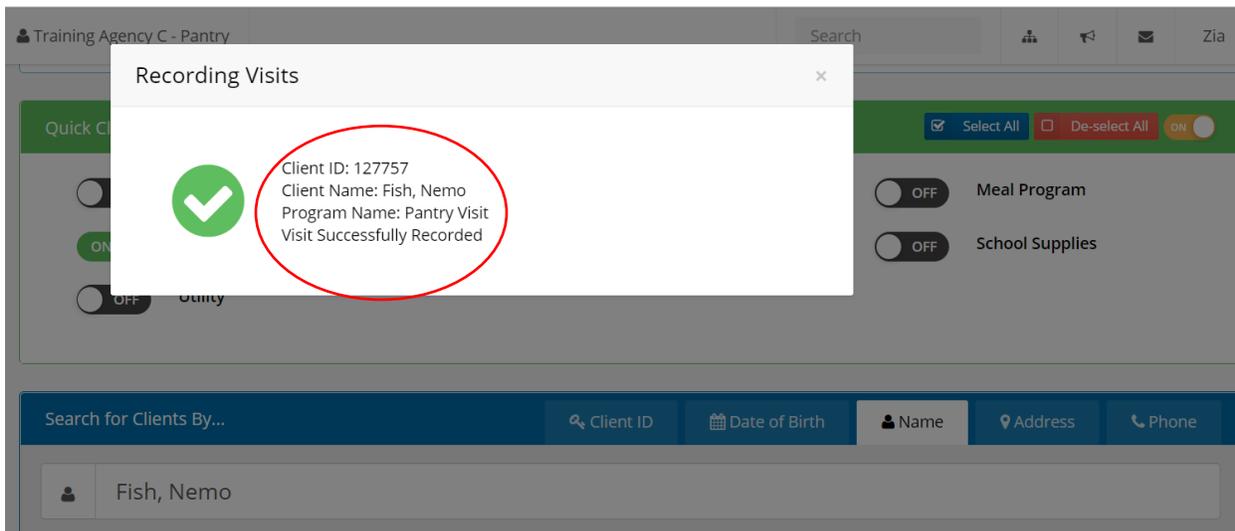
- Turn on the services that you would like to check the client in for. Double check accuracy between each client.



- Type the client's name into the search bar. Once correct client is identified, click the enter key. If client is not in system, continue New Client intake as normal.



- Service is now recorded and check in is complete.



7. If client is due for a Profile Review, Quick Click will redirect you to their profile and it must be fully reviewed before service can be recorded.

Training Agency C - Pantry

Search

Alert 1 x

Last Updated: 06-12-2018 @ 11:09 AM
Client also know as Spiderman

Failed
Client is in a forced review

1 PERSONAL 2 PROFILE 3 MONTHLY INCOME 4 DIETARY CONSIDER... SERVICES NOTES ACTIVITY

Personal Information Parker, Peter 27877

See Client in View Mode

Profile Review Required — This client has not visited in over 180 days. You must review the profile.
You must click "Save" or "Next" on each page in order to continue.

First Food Bank Visit Jun 12 2018 Status Inactive

Next Profile Review
Sep 9th — **Review today**

8. Once Profile Review is complete, either click to record a standard visit (below) or return to the Dashboard and proceed with Steps 5 and 6.

New Pantry Visit
Record a Regular Pantry Visit

New School Supplies

New Clothing Bank

New Rental Assistance

New Utility

New Meal

Last Profile Review
Sep 11th — today
 Review Profile On Next Visit

Last Visit to Agency
No activity has been recorded for this client.

If Client is accessing two or more services:

1. Simply toggle all applicable services on. (Can use Select All or De-select All Feature)
Again, double check between each client to ensure accuracy.

Training Agency B - TEFAP

Search

Quick Click Programs

Select All De-select All ON

OFF Meal Program ON Pantry Visit ON TEFAP Pantry Visit

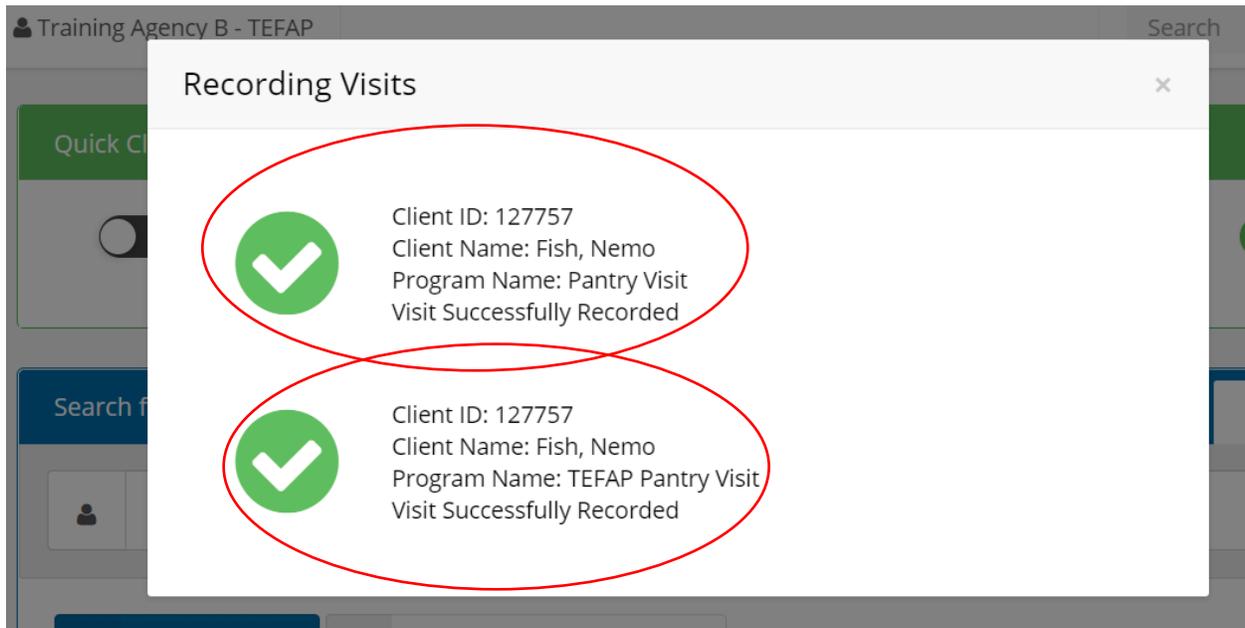
2. Type the client's name into the search bar. Once correct client is identified, click the enter key.
If client is not in system, continue with New Client intake as normal.

The screenshot shows the 'Quick Click Programs' section with three toggle switches: 'Meal Program' (OFF), 'Pantry Visit' (ON), and 'TEFAP Pantry Visit' (ON). Below this is the 'Search for Clients By...' section with tabs for 'Client ID', 'Date of Birth', 'Name', 'Address', and 'Phone'. The 'Name' tab is selected, and the search bar contains 'Fish, Nemo', which is circled in red. A dropdown menu shows 'Fish, Nemo' with the date '08-05-1985'. At the bottom, there are buttons for '+ New Client' and '+ New Anonymous Visit'.

3. If client is receiving TEFAP service, a signature screen will be prompted.

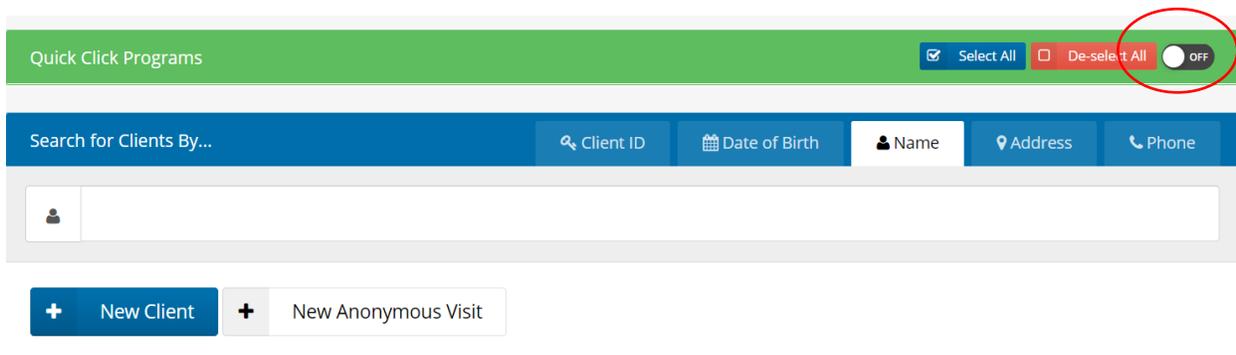
The screenshot shows the 'eSignature for TEFAP Pantry Visit' screen for client 'Fish, Nemo'. The screen is titled 'Client eSignature' and contains a 'Disclaimer' section with the following text: 'I CERTIFY WITH MY SIGNATURE that I am a resident of the service area of this agency, all household members receive some form of public assistance or have a combined gross monthly income that does not exceed the TEFAP Income Eligibility Guidelines, and members of my household have not received TEFAP foods during the current month. I UNDERSTAND that I may be prosecuted under current laws for accepting food I receive for which I am not eligible and the food received may not be sold, exchanged, or otherwise diverted from my household's use.' To the right of the disclaimer are three required fields: '* Signature Type' (dropdown menu with 'Sign On Screen' selected), '* Signatory' (dropdown menu with 'Nemo Fish' selected), and '* Client Signature' (button labeled 'Open Signature Canvas'). Below these fields is a 'Date' field with the value '2020-09-11'. At the bottom right, there are 'Save' and 'Cancel' buttons.

4. Once signature is recorded (if applicable), a confirmation screen will appear. It will separately list all recorded services.



Client Search (No Visit)

1. Ensure that Quick Click Programs Toggle is turned to OFF.



Further Questions?

Email: L2F@foodbankrockies.org

Watch: <https://www.youtube.com/watch?v=KyX9uWqOEz0>

Visit: <https://link2feed.atlassian.net/wiki/spaces/UserManual/pages/719028573/Quick+Click>