How to transfer JFS Forms to PantryTrak

Getting ready to use PantryTrak

Why Enter Information into PantryTrak?

- It prepares your pantry for when you begin using PantryTrak with clients in the room. Entering the information for each family takes different amounts of time depending on whether the volunteers are experienced with typing skills or are new volunteers with limited typing experience. For the comfort of your volunteers, and the speed of your distribution it is better for the information to have been entered before you try using PantryTrak with clients in the room.
- Builds your organization's service history. With PantryTrak you have access to an incredible level of reporting and information about your communities. You won't have access to the full level of information right away, but as your pantry uses PantryTrak and enters information in, your organization will build more and more history, and get more and more information. All of this information is transferrable to the past services you enter from your forms!
  - You've already done the hard work of giving out the food. Why not give yourself the tools to show off the need in your community and the great work you do to meet it?

Goals of document

- This document will instruct you on how to enter information contained on JFS form 04221 into PantryTrak in preparation for using the system for all of your registration and reporting needs.
- This document will also train you how to use PantryTrak and will quickly make you an expert on how to use PantryTrak and help you answer questions others may have about how to use the system.

Strategies to Train Volunteers on PantryTrak

- If you only want provide your volunteers with a minimum level of training, **at least 20 to 30 forms** will allow the volunteer to learn how PantryTrak works. This will also expose them to a few nuances of PantryTrak such as the three ways to search for families, how to enter new families, and how to edit the information of existing families.
- For a more complete level of training, data entry experience, and understanding, over 50 forms per volunteer would be preferable.
- After you've trained your volunteers why not get your pantry even more ready to use PantryTrak? As a general rule, the more information you enter, the easier it will be to start and use PantryTrak during a food distribution. If you store your forms alphabetically, start working your way down the alphabet and see how far you get before you can't resist the urge to start using PantryTrak with your clients!

Special Strategies to Enter Your Data in PantryTrak

- Group Saturday
  - To start out, it might work well for you to get a group of volunteers together and train them on the process of entering the forms. From there, you will all be able to work together and move a large number of your families and their service records into PantryTrak!
  - A similar strategy to the one above, you could get your youth group together, tell them to bring their laptops, buy a couple of pizzas and two liters. After a little training they can all then work to move your families and service records into PantryTrak. You never know, they might be able to move all of your families into PantryTrak in just a few hours!
- Bit by bit: While you have slow times in the Pantry, your regular desk volunteers can enter the old information for your pantry.
- Mirroring: Enter in the forms you process while you are getting ready to use PantryTrak. This can be done by your regular desk volunteers, or done later by a volunteer who likes data entry. Either way it will give you complete information or help you move into PantryTrak.

What is a JFS Form?

- Ohio Department of Job and Family Services Form 04221 (JFS Form) is filled out at the pantry level by either pantry volunteers, or the head of household.
- Through the form, the client's name, address, phone number, and number of household members are collected.
- When the client signs, they are *self-certifying* that their income is below the threshold for their household, and they are eligible to receive food.
- The same form can be used for multiple visits within the same state Fiscal Year, but must be changed each July.

Ohio Department of Job and Family Services

FEDERAL AND STATE FUNDED FOOD PROGRAMS
ELIGIBILITY TO TAKE FOOD HOME

This box is *optional* for local agency use, check one:
☐ A (Household with minor children)
☐ B (Household without minor children)

Name Washington, George

Address 789 Mt. Vernon Way,

City Mos Eisley | Zip 88701 | Area Code + Phone 614-577-1234

Number of people in household by age: age 60+ 2 age 18 - 59 2 age birth - 17 2 **Total** 6

This table shows yearly gross income for each family size. If your household income is at or below the income listed for the number of people in your household, you are eligible to receive food. This certification form is being completed in connection with the distribution of food from the state funded program and/or Federal assistance through The Emergency Food Assistance Program.

Household Size	Yearly Income	Monthly Income	Weekly Income
1	$22,979	$1,914	$441
2	$31,019	$2,584	$596
3	$39,059	$3,254	$751
4	$47,099	$3,924	$905
5	$55,139	$4,594	$1,060
6	$63,179	$5,264	$1,214
7	$71,219	$5,934	$1,369
8	$79,259	$6,604	$1,524
9	$87,299	$7,274	$1,678
For each additional person add	$8,040	$670	$155

Read the following statement carefully, then sign the form & write in today's date.

I certify that my current gross household income is at or below the income listed on this form for households with the same number of people as my household. I also certify that, as of today, my household lives in the area served by this agency. Program officials may verify what I have certified to be true. I understand that making a false certification may result in having to pay the State for the value of the food improperly issued to me and may subject me to criminal prosecution under State and Federal law.

Signature X | Date

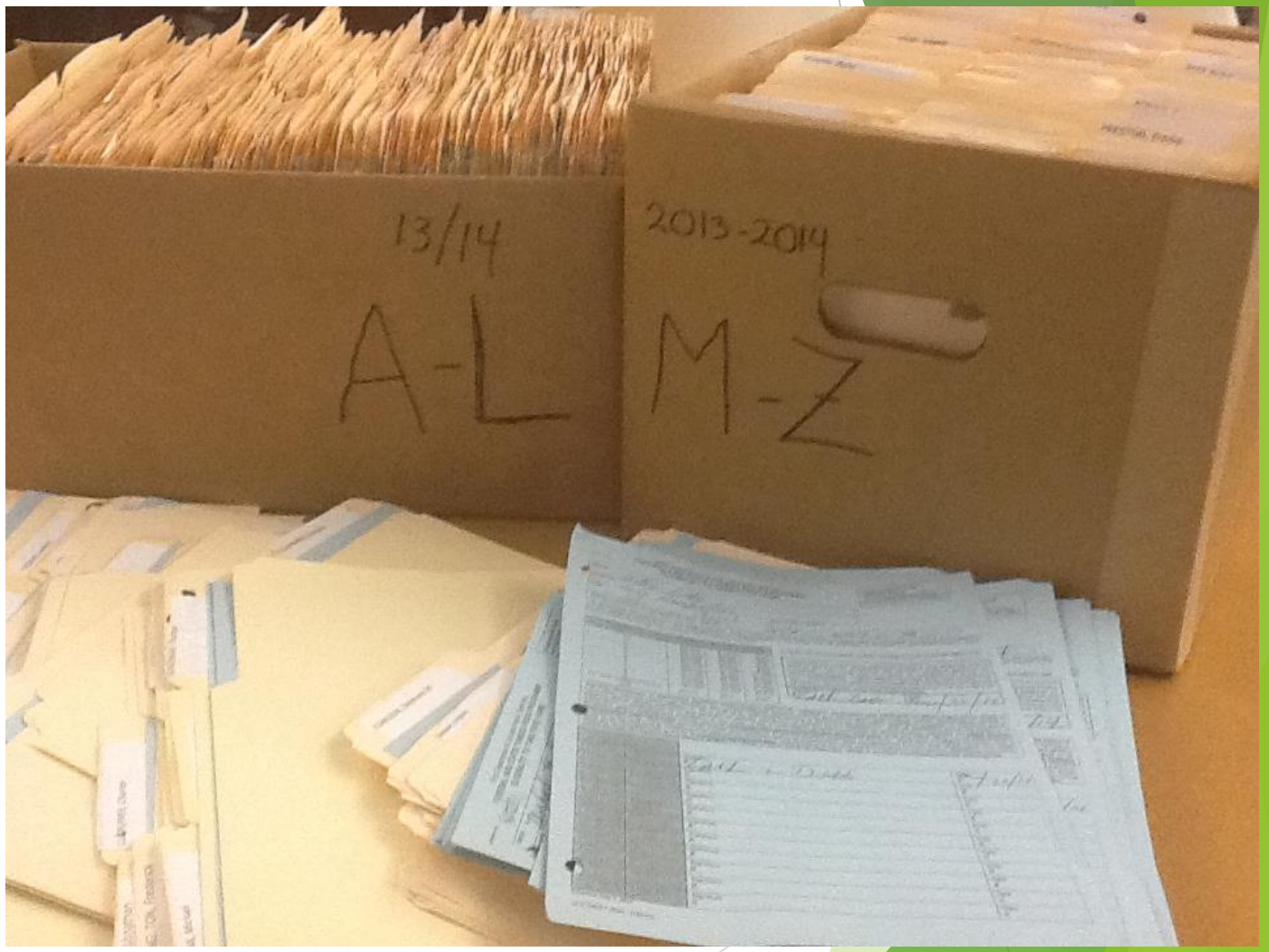
The U.S. Department of Agriculture prohibits discrimination against its customers, employees, and applicants for employment on the bases of race, color, national origin, age, disability, sex, gender identity, religion, reprisal, and where applicable, political beliefs, marital status, familial or parental status, sexual orientation, or all or part of an individual's income is derived from any public assistance program, or protected genetic information in employment or in any program or activity conducted or funded by the Department. (Not all prohibited bases will apply to all programs and/or employment activities.) If you wish to file a Civil Rights program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, found online at http://www.ascr.usda.gov/complaint_filing_cust.html, or at any USDA office, or call (866) 632-9992 to request the form. You may also write a letter containing all of the information requested in the form. Send your completed complaint form or letter to us by mail at U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, by fax (202)690-7442 or email at program.intake@usda.gov. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339; or (800) 845-6136 (Spanish). USDA is an equal opportunity provider and employer.

This box is optional for local agency use, check one:
Full Service ☐ | Partial Service ☐

Signature X | Date X

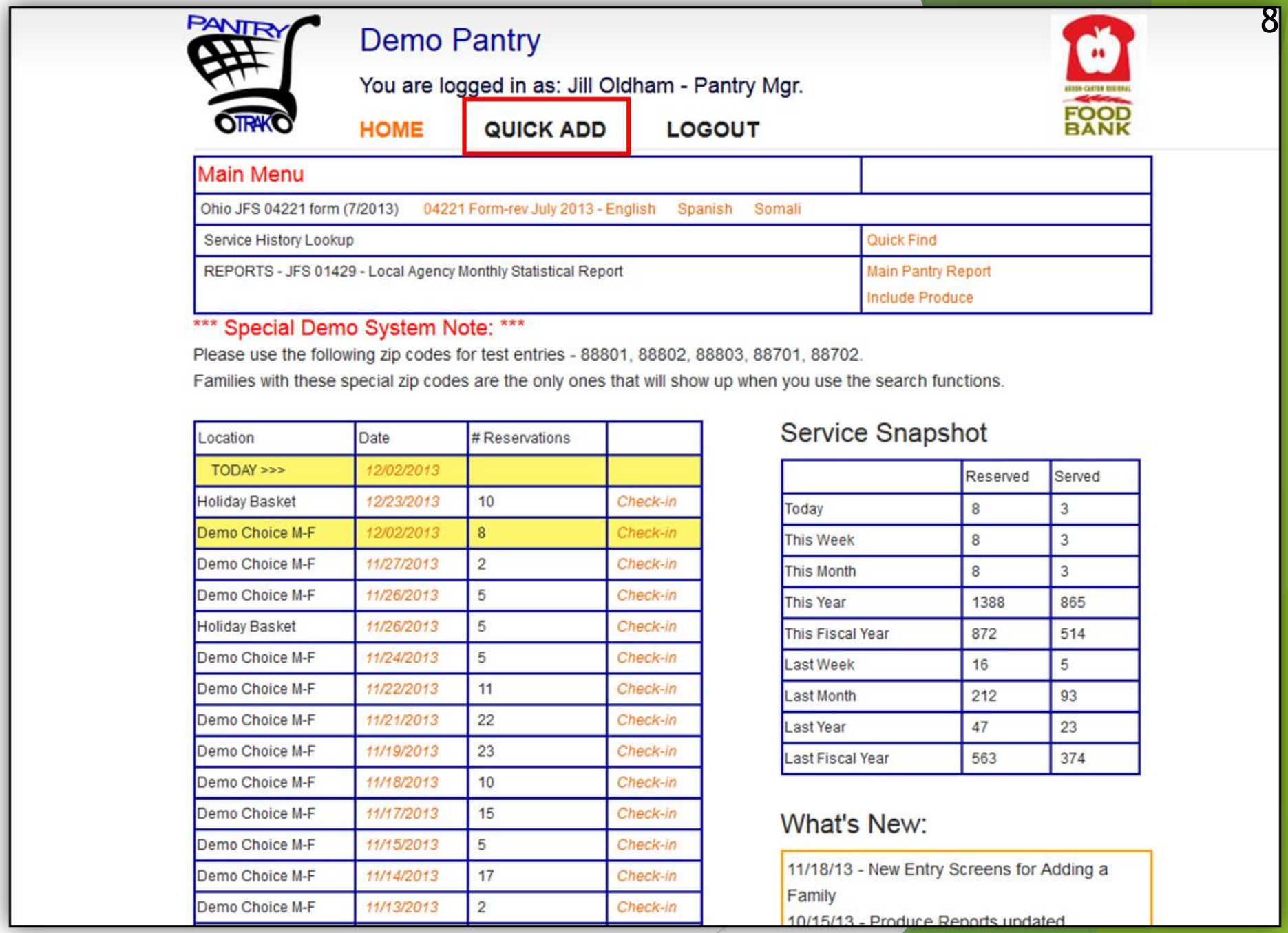
Why do we want to get rid of the JFS form?

- The JFS forms only showed a portion of the information regarding the families that you serve, PantryTrak provides you more comprehensive information about families and gives you better tools to better serve those families.
- PantryTrak eliminates storing JFS records for three years.
- Eliminates errors and difficult to read handwriting made on JFS forms



Main Screen Overview

- To begin the process of adding JFS forms to PantryTrak, click on Quick Add
- The next slides will walk you through the general process of entering JFS forms into PantryTrak



Demo Pantry

You are logged in as: Jill Oldham - Pantry Mgr.

HOME | QUICK ADD | LOGOUT

Main Menu

Ohio JFS 04221 form (7/2013) 04221 Form-rev July 2013 - English Spanish Somali

Service History Lookup | Quick Find

REPORTS - JFS 01429 - Local Agency Monthly Statistical Report | Main Pantry Report | Include Produce

*** Special Demo System Note: ***

Please use the following zip codes for test entries - 88801, 88802, 88803, 88701, 88702.

Families with these special zip codes are the only ones that will show up when you use the search functions.

Location	Date	# Reservations	
TODAY >>>	12/02/2013		
Holiday Basket	12/23/2013	10	Check-in
Demo Choice M-F	12/02/2013	8	Check-in
Demo Choice M-F	11/27/2013	2	Check-in
Demo Choice M-F	11/26/2013	5	Check-in
Holiday Basket	11/26/2013	5	Check-in
Demo Choice M-F	11/24/2013	5	Check-in
Demo Choice M-F	11/22/2013	11	Check-in
Demo Choice M-F	11/21/2013	22	Check-in
Demo Choice M-F	11/19/2013	23	Check-in
Demo Choice M-F	11/18/2013	10	Check-in
Demo Choice M-F	11/17/2013	15	Check-in
Demo Choice M-F	11/15/2013	5	Check-in
Demo Choice M-F	11/14/2013	17	Check-in
Demo Choice M-F	11/13/2013	2	Check-in

Service Snapshot

	Reserved	Served
Today	8	3
This Week	8	3
This Month	8	3
This Year	1388	865
This Fiscal Year	872	514
Last Week	16	5
Last Month	212	93
Last Year	47	23
Last Fiscal Year	563	374

What's New:

11/18/13 - New Entry Screens for Adding a Family

10/15/13 - Produce Reports updated

Search for Client

- When you begin entering your JFS forms into PantryTrak it is very important that you first search for your families. By searching and finding a family, you will not have to enter that families' information into the system again.

- Searching for families is an important skill to have when using the system with clients during distribution and is the key to maintaining an accurate un-duplicated count.

Searching for Clients

- Sometime when you search for a family you will get the message:
  "Sorry over 300 records" this means there are large number of families with the name, phone number, or address you are search for.

- Don't worry though, there are a number of ways to narrow down a search. Check out the next couple of slides to learn about mastering how to search.

Searching for Clients

There are a number of ways to search for families and mastering all three will give you the tools to quickly and easily find your families.

This box has two search options

- Last Name
  1. i.e. Washington
  2. i.e smith, j
- Last four digits of phone number
  1. i.e 5678

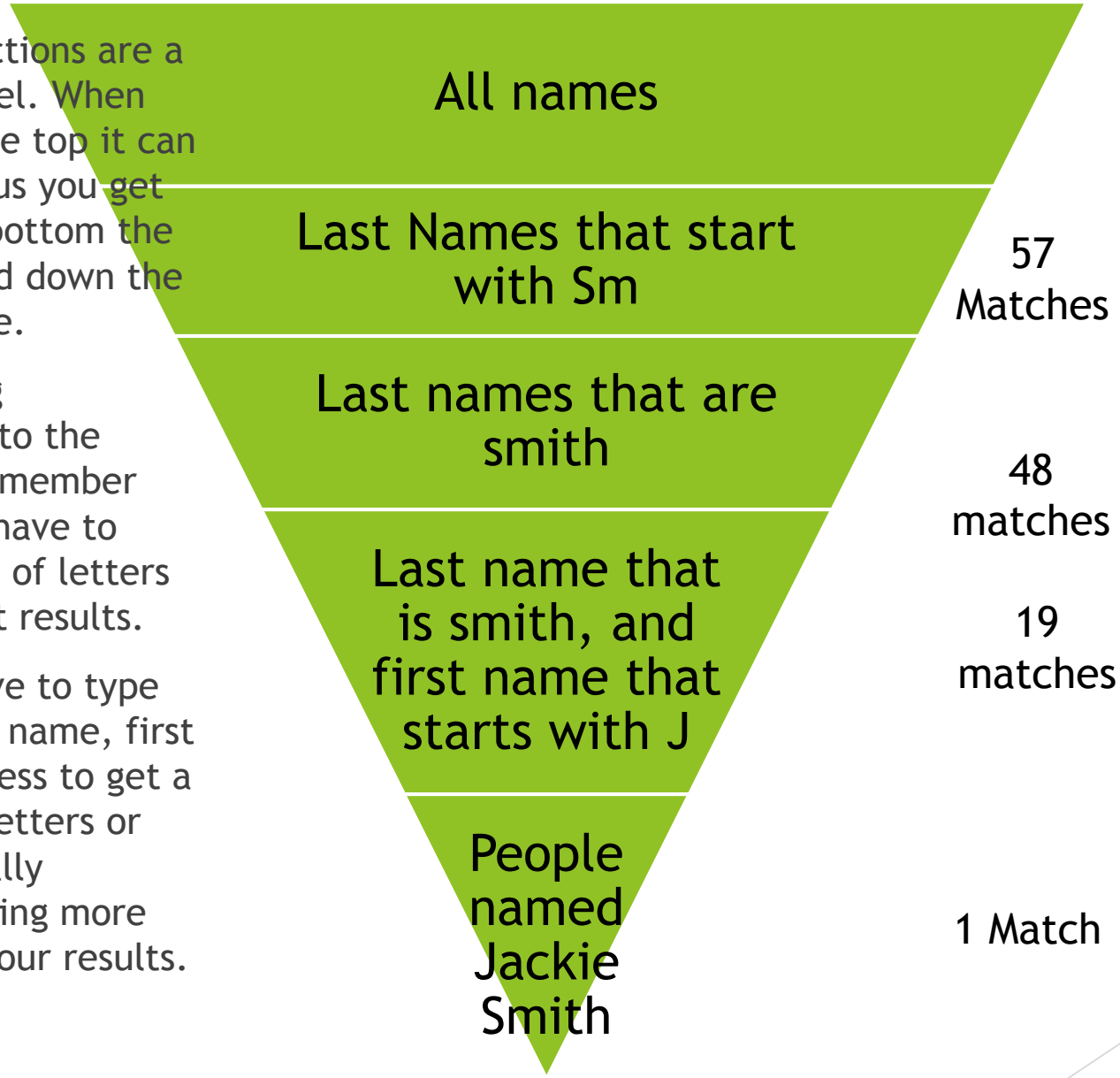
Or search by:

- Street Address
  1. i.e 1234
  2. i.e 1600
- Narrow it down with a street
  1. i.e 123 Main
  2. i.e 1600 Penn

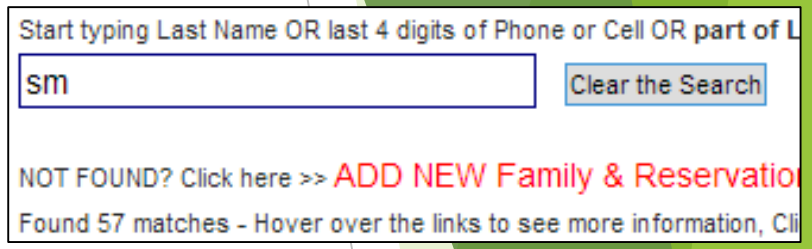
Searching for Clients – by name

- Searching functions are a lot like a funnel. When you start at the top it can hold a lot. As us you get closer to the bottom the more narrowed down the results become.

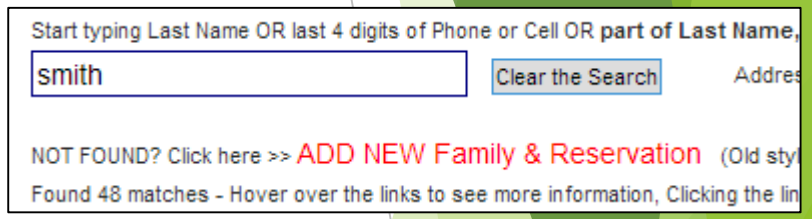
1. When entering information into the search box, remember that you only have to type of couple of letters or digits to get results.
2. You do not have to type in the full last name, first name, or address to get a result. A few letters or digits are usually sufficient. Typing more just narrows your results.



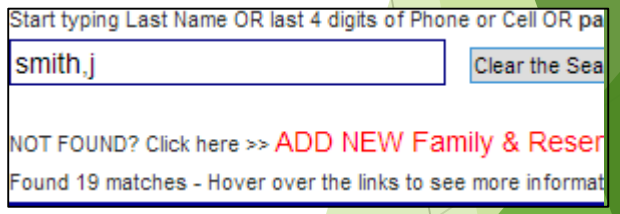
57 Matches



48 matches



19 matches

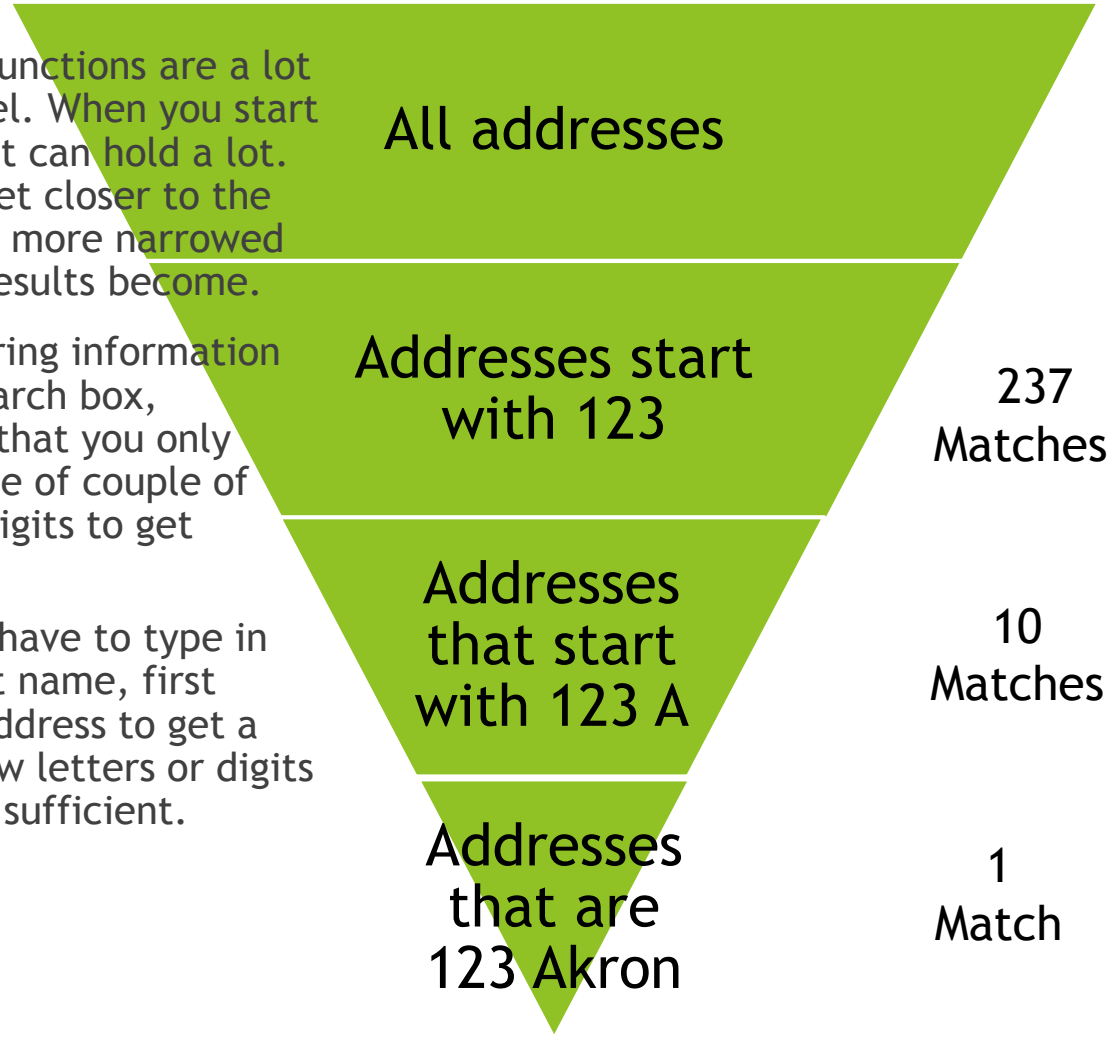


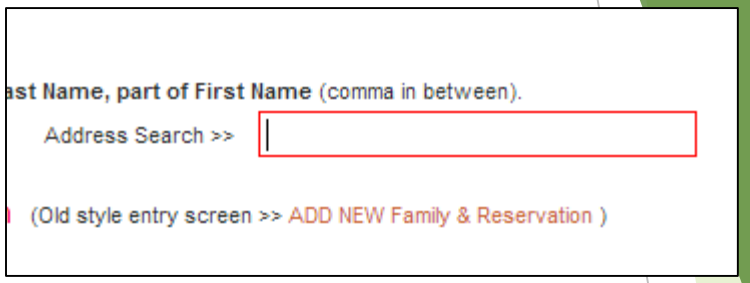
1 Match

Searching for Clients-Address

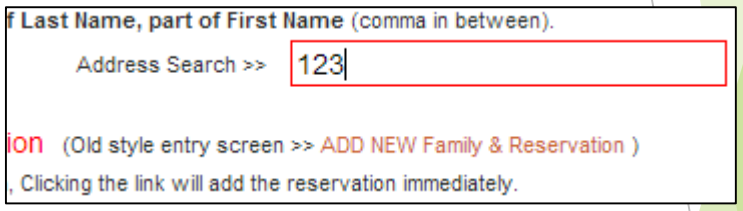
- Searching functions are a lot like a funnel. When you start at the top it can hold a lot. As us you get closer to the bottom the more narrowed down the results become.

1. When entering information into the search box, remember that you only have to type of couple of letters or digits to get results.
2. You do not have to type in the full last name, first name, or address to get a result. A few letters or digits are usually sufficient.

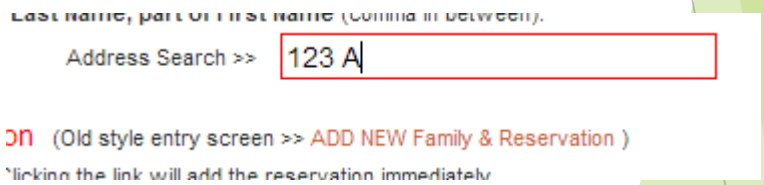




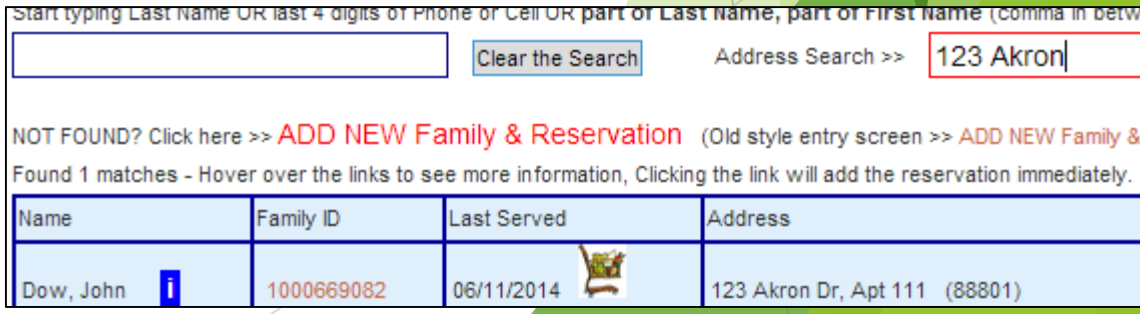
237 Matches



10 Matches



1 Match



Search Results

- After searching for last name or address, these columns will appear:

Name Search >> washington | Clear the Search | **Address Search >>**

NOT FOUND? >> ADD NEW Family & Reservation (Old style entry screen >> ADD NEW Family & Reservation)

Found 6 matches - Hover over the links to see more information, Clicking the link will add the reservation immediately.

Name	Family ID	Last Served	Address	City	Phone	Merge?
Washington, Denzel	178476	08/29/2014	13533 E 222nd Street, Apt. 1 (88801)	Bedford Falls	216-555-5525	☐
Washington, George	178715	08/29/2014	1600 Pennsylvania Avenue, Apt. 13 (88701)	Mos Eisley	614-575-1236	☐
Washington, George	178933	08/19/2014	1600 Pennsylvania Ave (88801)	Bedford Falls	740/222/2222	☑
Washington, George	178934	08/19/2014	1600 Psylvania Ave. (88801)	Bedford Falls	740-222-2222	☑
Washington, George	178663	08/21/2014	456 Mt. Vernon Blvd. (88803)	Emerald City	214-043-1789	☐
Washington, Kerry	178479	08/25/2014	1465. East Green St (88801)	Bedford Falls	614-125-3386	☐

Name- last, first

Last Served- the last time the family received a service at your pantry(Does not show services received at other organizations)

Address- includes, street number, street, address 2, and zip code.

City

Phone number- if a family does not have a phone, the word “none” should appear in this field

Merge- if you see that there are duplicate records of a family, you click the merge field on both records.(The merge will not happen instantaneously, but will eventually take effect.

Searching for Clients-Hover Over

- The hover over function is a great way to get a sneak peak into a client record.
- To use it, place your mouse over Family ID, but do not click on Family ID

Start typing Last Name OR last 4 digits of Phone or Cell OR **part of Last Name, part of First Name** (comma in between).

bar | Clear the Search | Address Search >>

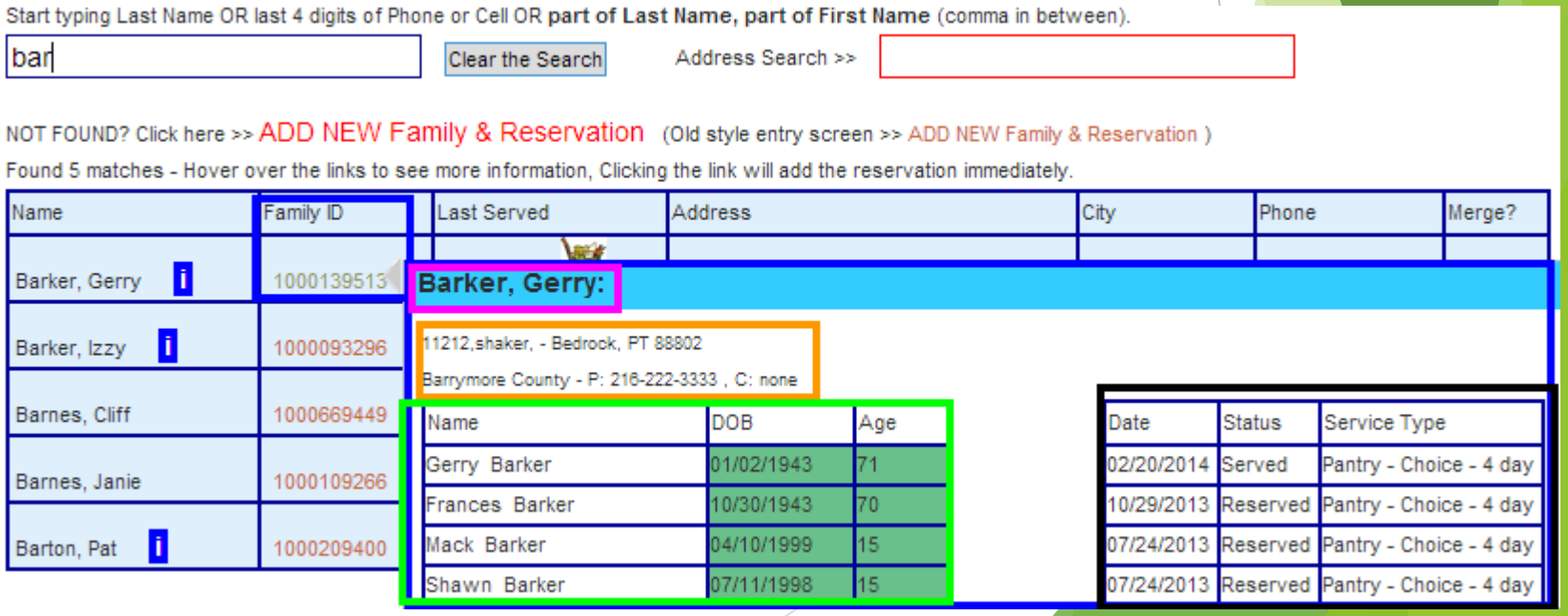
NOT FOUND? Click here >> ADD NEW Family & Reservation (Old style entry screen >> ADD NEW Family & Reservation)

Found 5 matches - Hover over the links to see more information, Clicking the link will add the reservation immediately.

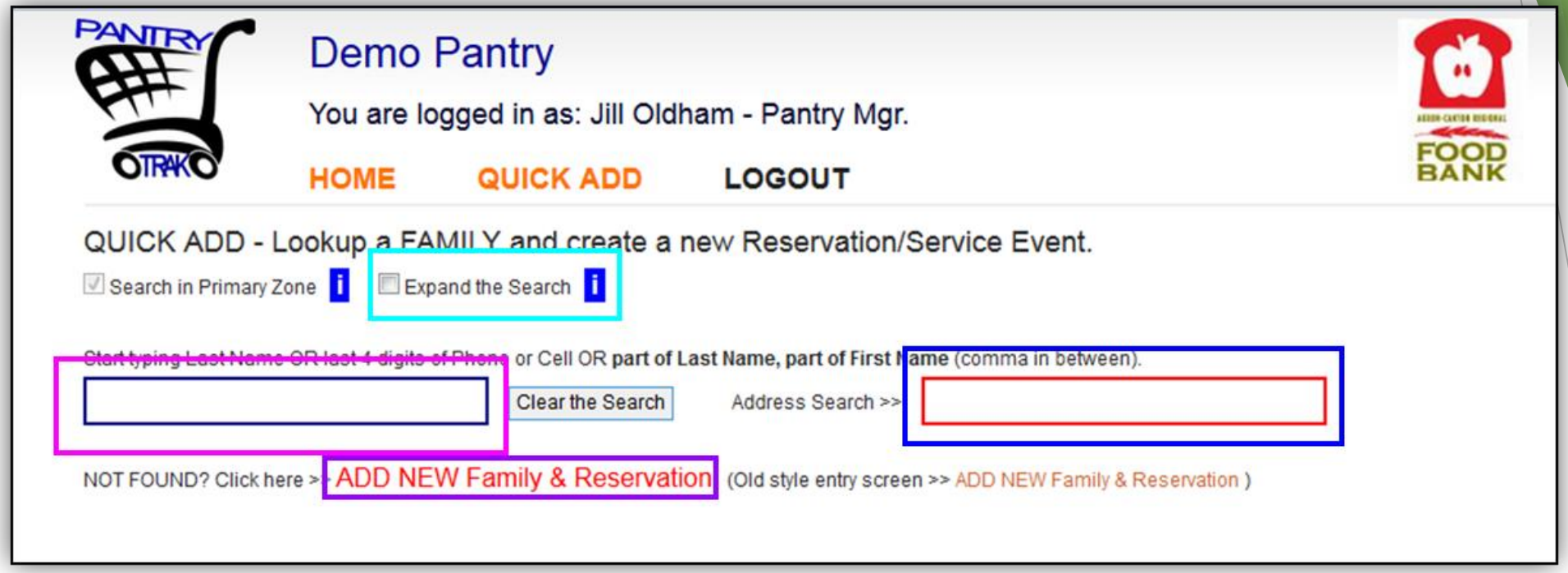
Name	Family ID	Last Served	Address	City	Phone	Merge?
Barker, Gerry	1000139513	02/20/2014	11212,shaker (88802)	Bedrock	216-222-3333	
Barker, Izzy	1000093296	11/17/2013	301 North 5th Street (88701)	Mos Eisley		

After you hover over the ID, you will see:

1. Client's name
2. Client's address
3. Phone number,
4. Who is the family
5. Past five service visits
   - If this is the correct client, click on Family ID and proceed to slide 17.(Clicking on Family ID multiple times, will create multiple family records, so only click ID once)
   - If you do not find the family you are looking for, check out the next page for searching tips.



No Results

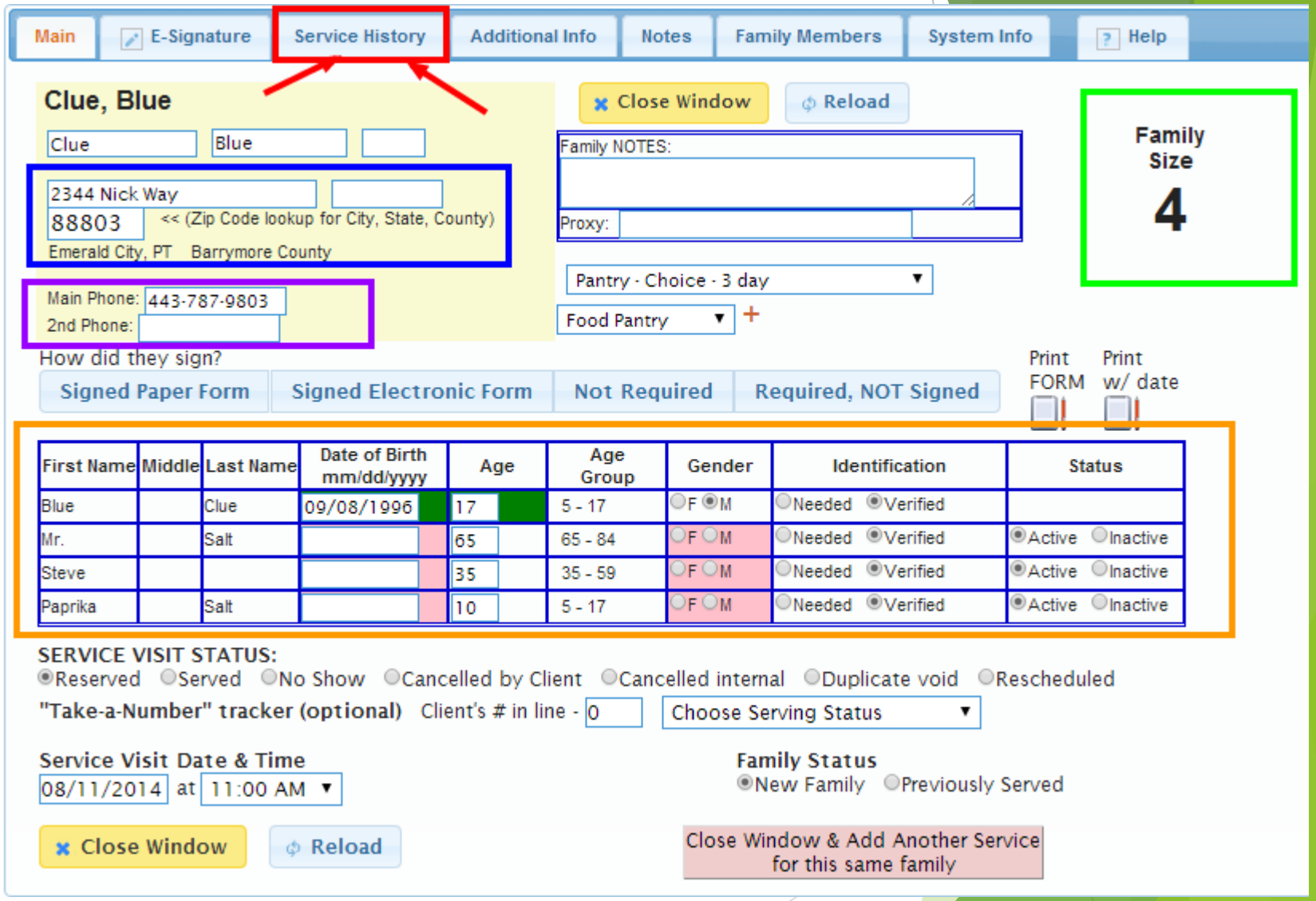


- If last name yields no results than follow these steps
  1. Expand the search and try the name again.
  2. Search for client's address.
  3. Search for the last four digits of the client's phone number.
- If none of these searches produce any results than add new client.
  - Directions for this are on slide 26.

Scenario 1- Family already in PantryTrak

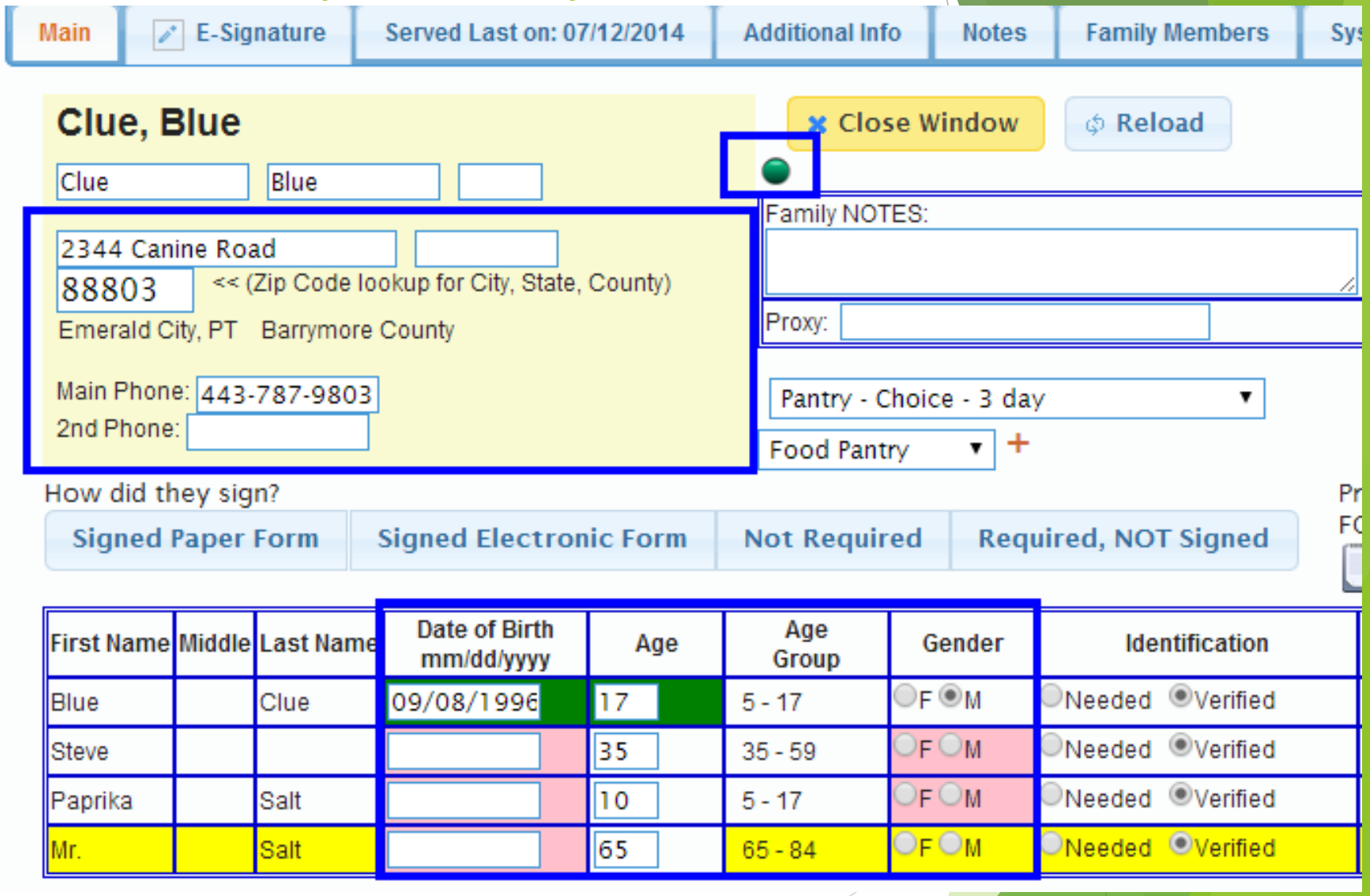
- Check the JFS form and verify that the info matches:

1. Address and zip code match JFS form
2. Phone number matches JFS form
3. Number in household correlates with JFS form
   - If the information from the JFS form does not match, go to slide 18 to learn how to correctly add information from JFS forms into PantryTrak.
   - If no changes need to be made click on service history and go to slide 21 to learn about this tab.



Scenario 1- Changes to a Family Already in PantryTrak

- If the address or phone number that is already in the system does not match the JFS form, click in the address or phone number box to modify the information. A green dot will appear when the information is updated.
- If you have extra information and can update click in the box to enter a date of birth.
- If you don't have a birthday, but know an age, you can enter that into the column.
- To add notes about families, click in note box and add the information.
- To change family size in PantryTrak, there are a few ways to do this. Go to next slide to find out more



Scenario 1- Changes to Family Size

- If you need to add/remove members of the household that already appear under the household information, click inactive or active next to their name. Reload the page and the household member will change from white to yellow if you click “inactive” and yellow to white if you click “active”.
- If you need to add a new family members that do not already appear in the household click on family members tab.

Main | E-Signature | Served Last on: 07/12/2014 | Additional Info | Notes | Family Members | System Info | Help

Clue, Blue

Clue | Blue

2344 Canine Road
88803 << (Zip Code lookup for City, State, County)
Emerald City, PT Barrymore County

Main Phone: 443-787-9803
2nd Phone:

Close Window | Reload

Family NOTES:

Proxy:

Pantry - Choice - 3 day

Food Pantry +

Family Size
3

How did they sign?
Signed Paper Form | Signed Electronic Form | Not Required | Required, NOT Signed

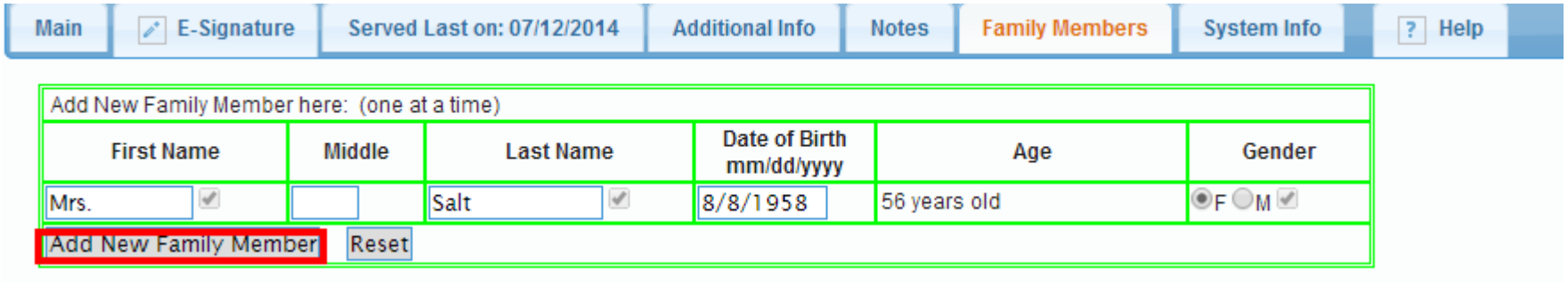
Print FORM | Print w/ date

First Name	Middle	Last Name	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Identification	Status
Blue		Clue	09/08/1996	17	5 - 17	F M	Needed Verified	
Steve				35	35 - 59	F M	Needed Verified	Active Inactive
Paprika		Salt		10	5 - 17	F M	Needed Verified	Active Inactive
Mr.		Salt		65	65 - 84	F M	Needed Verified	Active Inactive

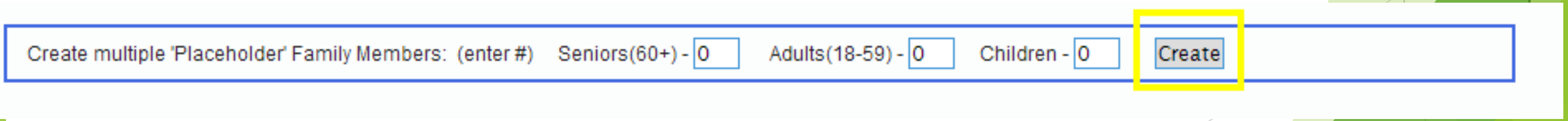
First Name	Middle	Last Name	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Identification	Status
Blue		Clue	09/08/1996	17	5 - 17	F M	Needed Verified	
Mr.		Salt		65	65 - 84	F M	Needed Verified	Active Inactive
Steve				35	35 - 59	F M	Needed Verified	Active Inactive
Paprika		Salt		10	5 - 17	F M	Needed Verified	Active Inactive

Scenario 1- Changes to Family Size

- If you have supporting documents that provide you with have the name of the person you need to add, type this information into the green boxes. To add this person to the household, make sure to click “Add New Family Member” to add them to the family. Repeat the process to add more family members as necessary.



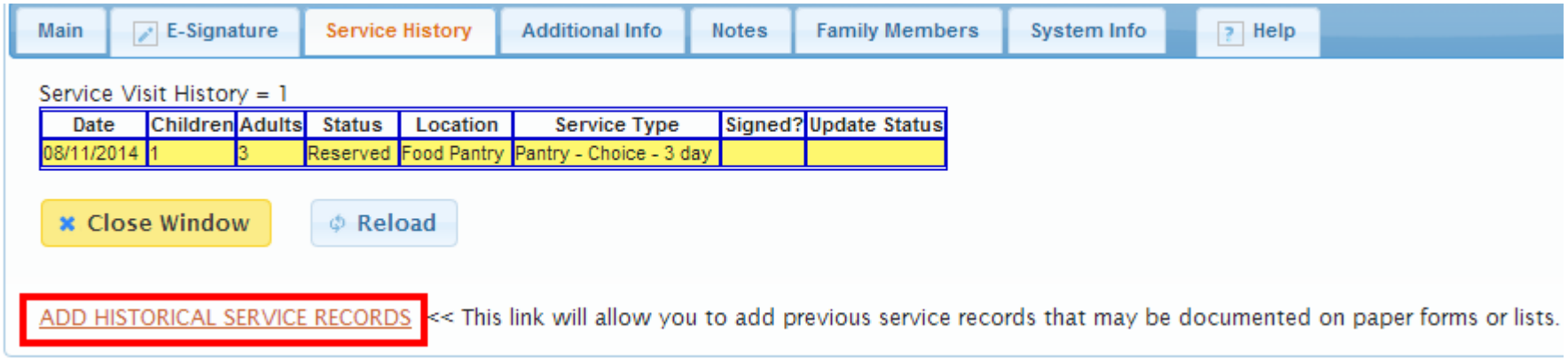
- If you only have the JFS form that gives you only with the amount of people in family without any extra information, create placeholder family members for the people you want to add. When the family comes back, you can complete their record. Make sure to click create to add placeholders to the family



- After you are done adding/subtracting members from the household, to add service history to family record, click service history tab.

Historical Service Records

- To add dates from the JFS form click on add Historical Service Records.
- Adding your families to PantryTrak helps get your pantry ready to use the system. However, one of the most important yet over looked parts od getting your pantry ready to use PantryTrak is building in the serve history of your families. The next couple of screens will walk you through how to do this.



Historical Records Continued

- After you click "Add Historical Record", you will come to a screen with 12 empty boxes. Enter these dates into the boxes.

Ohio Department of Job and Family Services
FEDERAL AND STATE FUNDED FOOD PROGRAMS
ELIGIBILITY TO TAKE FOOD HOME

This box is *optional* for local agency use, check one:
☐ A (Household with minor children)
☐ B (Household without minor children)

Name		
Address		
City	Zip	Area Code + Phone

Number of people in household by age: age 60+ ___ age 18 - 59 ___ age birth - 17 ___ **Total** ___

This table shows yearly gross income for each family size. If your household income is at or below the income listed for the number of people in your household, you are eligible to receive food. This certification form is being completed in connection with the distribution of food from the state funded program and/or Federal assistance through The Emergency Food Assistance Program.

Household Size	Yearly Income	Monthly Income	Weekly Income
1	$22,979	$1,914	$441
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For each additional person add	$8,040	$670	$155

Read the following statement carefully, then sign the form & write in today's date.

I certify that my current gross household income is at or below the income listed on this form for households with the same number of people as my household. I also certify that, as of today, my household lives in the area served by this agency. Program officials may verify what I have certified to be true. I understand that making a false certification may result in having to pay the State for the value of the food improperly issued to me and may subject me to criminal prosecution under State and Federal law

Signature X | Date

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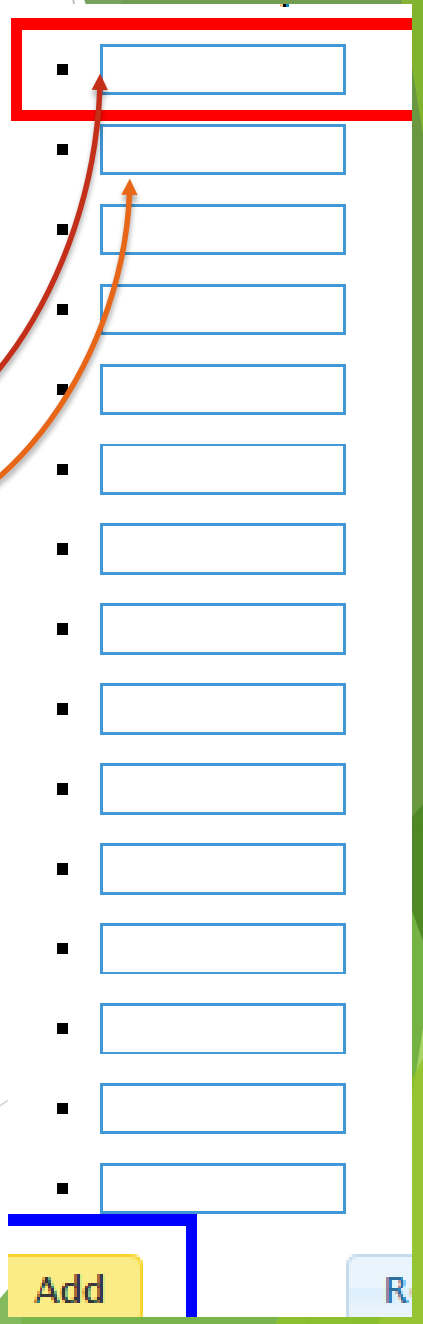
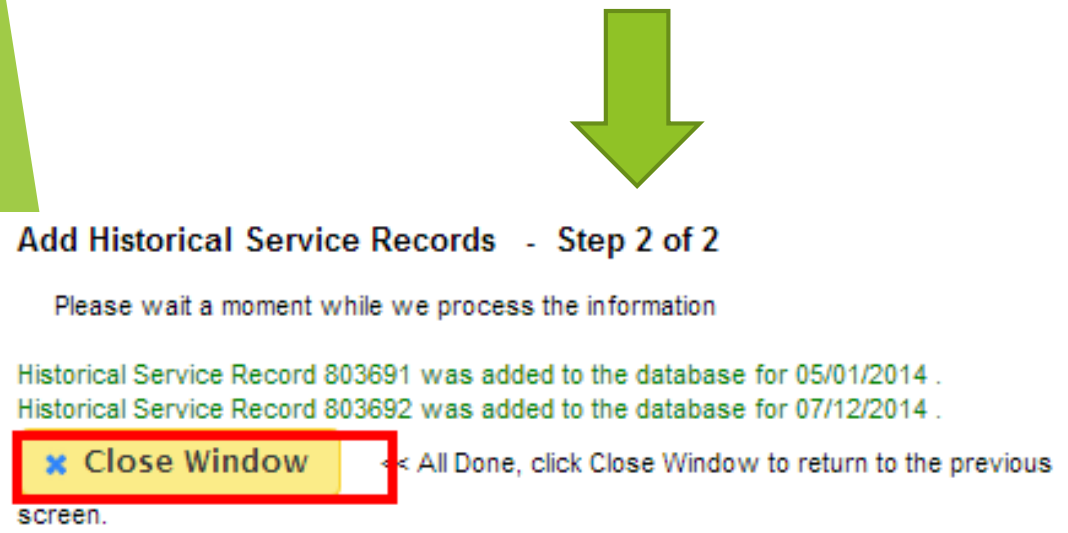
This box is optional for local agency use, check one:			
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X
Full Service ☐	Partial Service ☐	Signature X	Date X

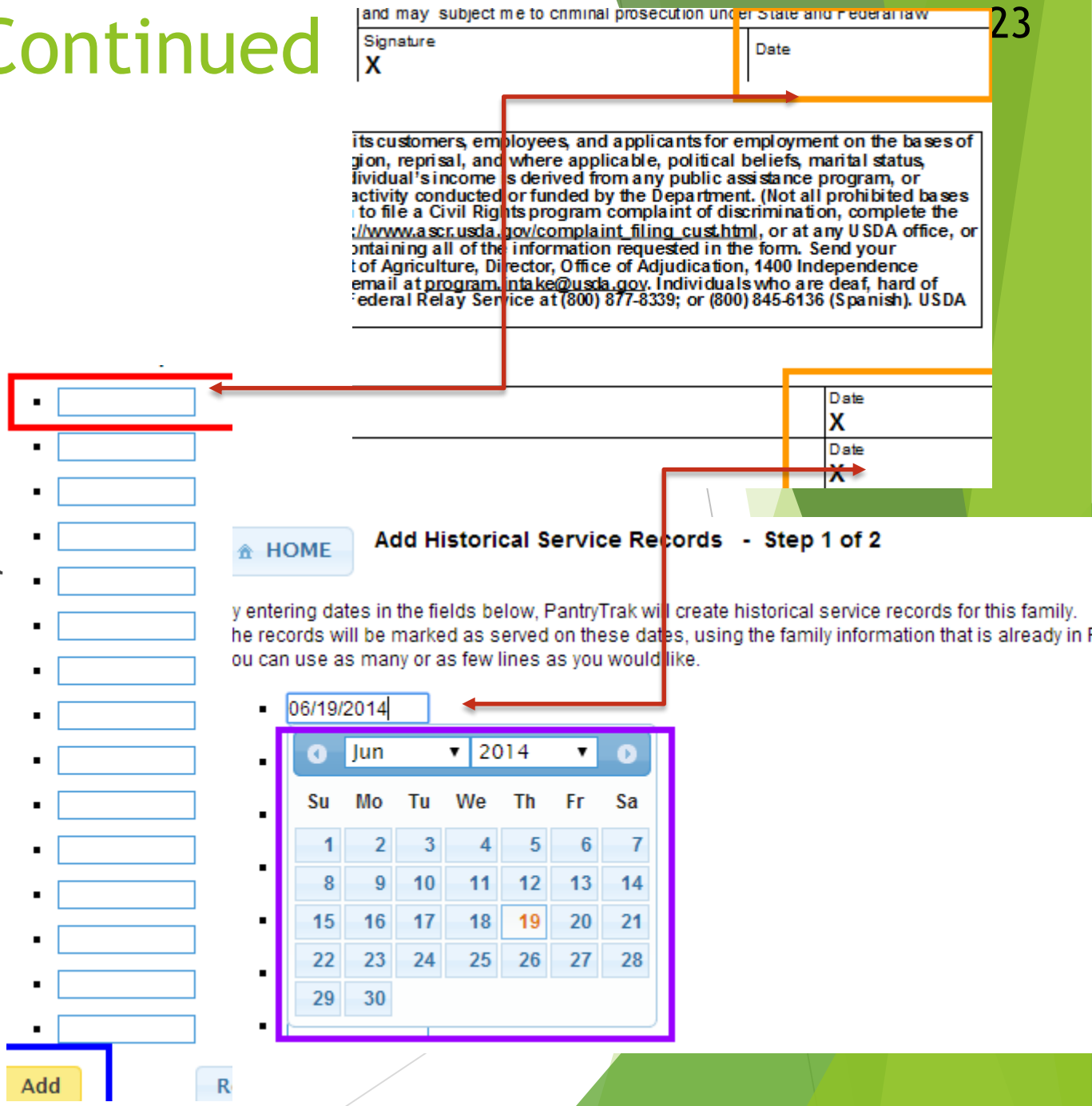
EFFECTIVE JULY 1, 2013
JFS 04221 (Rev. 7/2013) English



Historical Service Records Continued

- To enter date into boxes, either choose correct date on calendar or type in the date as mm/dd/yyyy
  - 01/01/2013 is the proper format, not 1/1/13. If you type in 1/1/13 the computer literally thinks this is the year 13 AD and will not accept the value
- To save records to PantryTrak, click on Add button
  - If records are entered correctly, green text will appear on screen. Click close record to exit Historical Records.





Adding New Family into PantryTrak

- How to add a new family from a JFS form and transfer their information into PantryTrak

Ohio Department of Job and Family Services
FEDERAL AND STATE FUNDED FOOD PROGRAMS
ELIGIBILITY TO TAKE FOOD HOME

This box is *optional* for local agency use, check one:
☐ A (Household with minor children)
☐ B (Household without minor children)

Name: George Washington
Address: 456 Mount Vernon Way
City: Bedford Falls | Zip: 88801 | Area Code + Phone: 614 575 1236

Number of people in household by age: age 60+ 2 | age 18 - 59 2 | age birth - 17 2 | Total 6

This table shows yearly gross income for each family size. If your household income is at or below the income listed for the number of people in your household, you are eligible to receive food. This certification form is being completed in connection with the distribution of food from the state funded program and/or Federal assistance through The Emergency Food Assistance Program.

Household Size	Yearly Income	Monthly Income	Weekly Income
1	$22,979	$1,914	$441
2	$31,019	$2,584	$596
3	$39,059	$3,254	$751
4	$47,099	$3,924	$905
5	$55,139	$4,594	$1,060
6	$63,179	$5,264	$1,214
7	$71,219	$5,934	$1,369
8	$79,259	$6,604	$1,524
9	$87,299	$7,274	$1,678
For each additional person add	$8,040	$670	$155

Read the following statement carefully, then sign the form & write in today's date.

I certify that my current gross household income is at or below the income listed on this form for households with the same number of people as my household. I also certify that, as of today, my household lives in the area served by this agency. Program officials may verify what I have certified to be true. I understand that making a false certification may result in having to pay the State for the value of the food improperly issued to me and may subject me to criminal prosecution under State and Federal law.

Signature: X George Washington | Date: 7/13/2013

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This box is optional for local agency use, check one:

Full Service	Partial Service	Signature	Date
☐	☐	X	X
☐	☐	X	X
☐	☐	X	X
☐	☐	X	X
☐	☐	X	X
☐	☐	X	X
☐	☐	X	X
☐	☐	X	X
☐	☐	X	X

HOME

Add a NEW Family and Service Record for TODAY, Monday Feb 3, 2014 - Step 1 of 3

Head of Household (HH)	Last- Washington First- George Middle-
Address Line(s)	456 Mt. Vernon Blvd. (Street address) (Apt #, Lot #, etc.)
Zip Code	88801 Bedford Falls, Barrymore County, PT *** Special Demo System Note: *** Please use the following zip codes for test entries - 88801, 88802, 88803, 88701, 88702. Families with these special zip codes are the only ones that will show up when you use the search functions.
Phone Numbers	Phone- 214-043-1789 Cell- 214-034-1797
Personal Information (HH)	Date of Birth 12/14/1899 114 years old Gender: ○ F ● M ○ Not Specified or Listed
Total # in household by Age Group:	age 60+ 2 age 18 - 59 2 age birth - 17 2 (including Head o

NEXT

Reset | ✖ Close Window & Don't ADD new record

Did your search?

- Before adding a new family to PantryTrak, make sure you exhausted all your search options.

Remember this box has two search options

Last Name

1. i.e. Washington
2. i.e smith, j

Last four digits of phone number

1. i.e 5678

Remember this box is search by:

- Street Address
  1. i.e 1234
  2. i.e 1600
- Narrow it down with a street
  1. i.e 123 Main
  2. i.e 1600 Penn

- Remember expanding the search will also help you to locate families.

Scenario 2: Add New Client

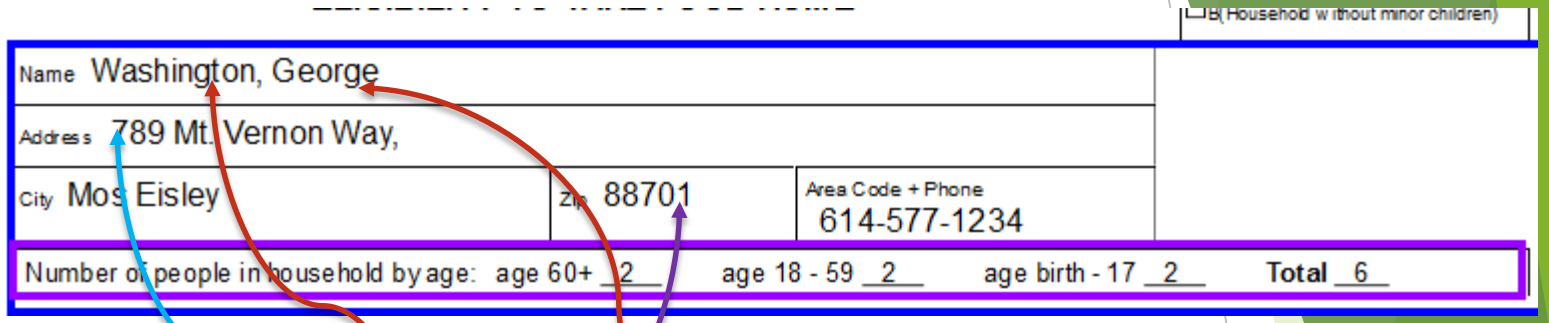
- Transfer information from JFS form to the respective boxes:

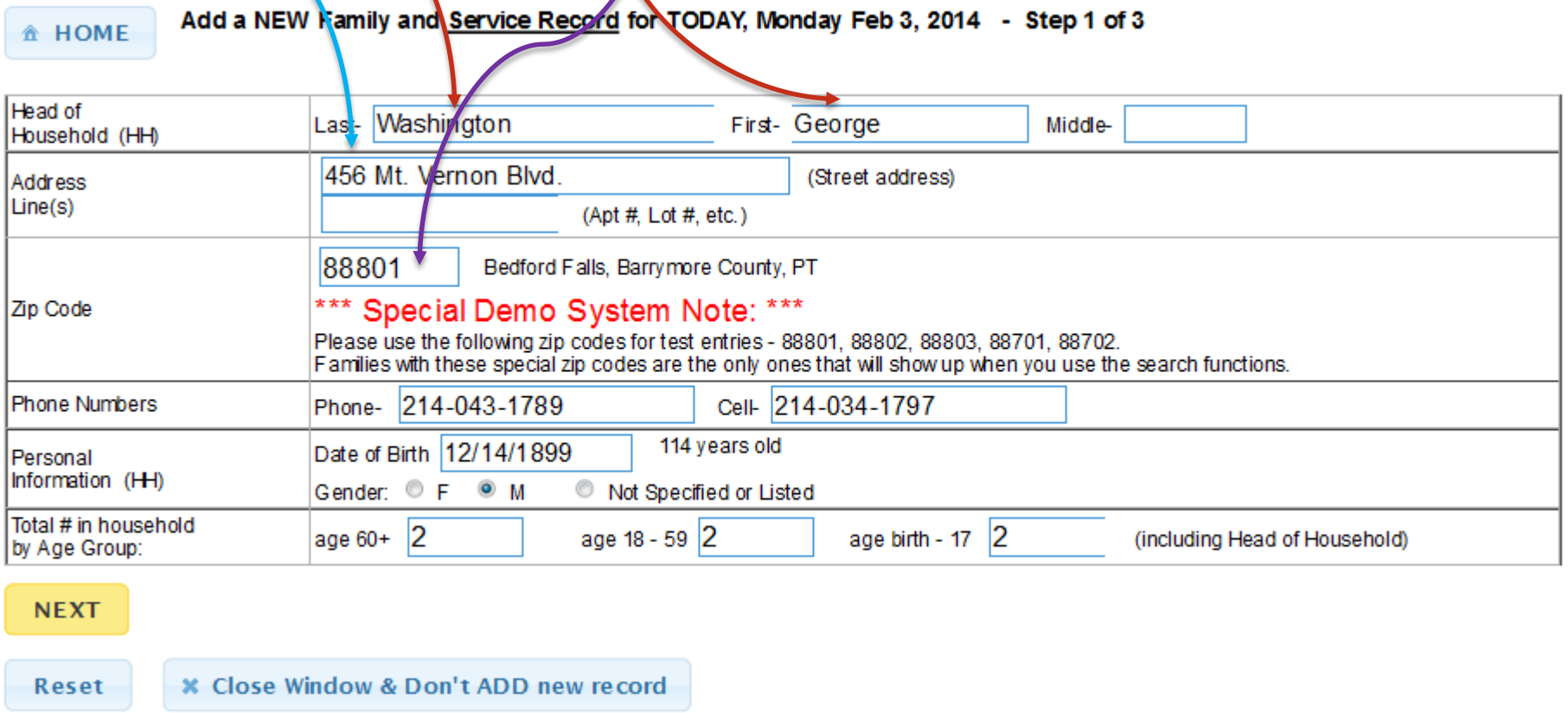
1. First and last name of head of household
2. Address

- When including lots and apartments, make sure to type Apt or Lot with the number i.e Apt 102 or Lot 33

1. Zip code

- If a zip code falls in multiple counties you'll have to determine which county they live in. Use your best judgment, or use google maps.





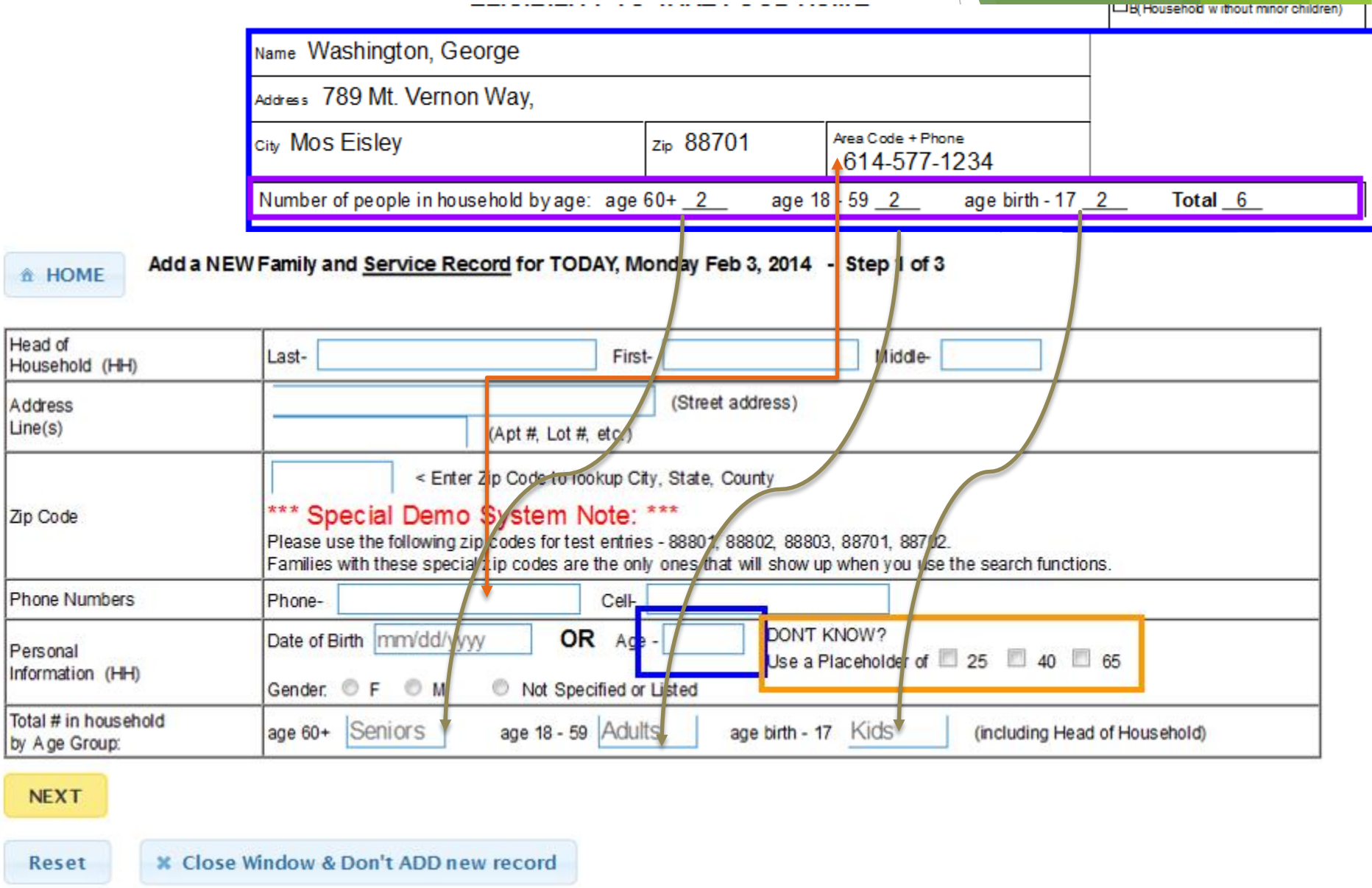
Scenario 2: Add New Client Continued

1. Phone number(if client has no phone, type None into box.)
2. Date of Birth(format must be: mm/dd/yyyy i.e 09/20/1992)

- If you do not have HOH birthdate that okay, type in age if you know it, or use a placeholder for now.
- To guess which placeholder to use for HOH age, look at total number in household and by process of elimination use the most appropriate placeholder.

1. Gender
2. Total # in household. In each age group include the head of household in the proper count.

- Click next



Scenario 2:Add New Client and Historical Service

- If your pantry had used any extra documents or forms to register families fill out any member names or ages you might have, or know.
  - If you don't have any extra information, that is fine too, just leave the placeholder information in place
- To add historical data from JFS forms checkmark the Yes that appears under Other Family Members box.

HOME

Add a NEW Family and Service Record for TODAY, Thursday Aug 7, 2014 - Step 2 of 3

Head of Household (HH)	Last- Bravo First- Johnny Middle-
Address Line(s)	3450 Cartoon Blvd. (Street address) (Apt #, Lot #, etc.)
City, State, Zip	Mos Eisley PT 88701 Barrymore County
Phone Numbers	658-990-0890
Personal Information (HH)	Date of Birth (mm/dd/yyyy) 8/17/1979 OR Age- 34 Gender: M
# in household by Age Group:	age 60+ 0 age 18 - 59 2 age birth - 17 3

OTHER Family Members (Please DO NOT re-enter the Head of Household, if you need to add more Family Members, you can do it on the next screen)
Please update the "placeholder" names below with any information that you have for the remaining Family Members

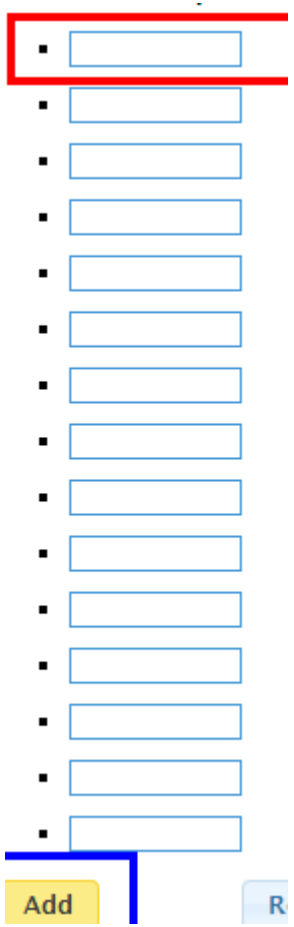
Last Name	First Name	Middle	Date of Birth mm/dd/yyyy	Age	Gender
Bravo	Adult1			Use Placeholder Age(35)? ☑	F M
Bravo	Child1			Use Placeholder Age(10)? ☑	F M
Bravo	Child2			Use Placeholder Age(10)? ☑	F M
Bravo	Child3			Use Placeholder Age(10)? ☑	F M

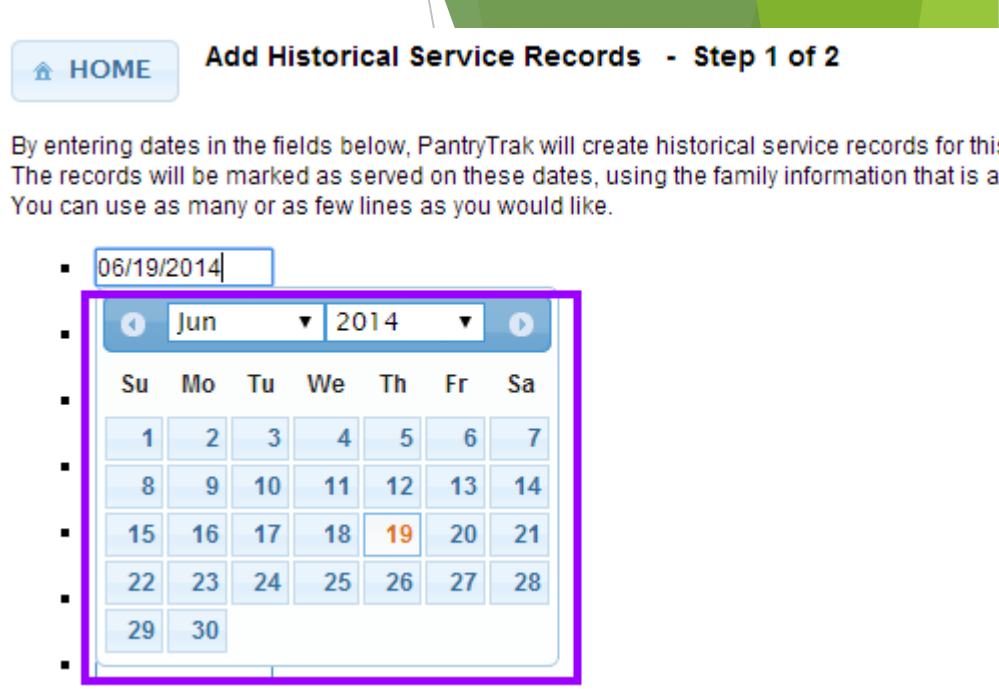
☐ Yes, I want to add Historical Service records from prior forms or logs sheets for this family. Otherwise, just complete the information about the Other Family Members
Click Here to display the lines for entering service history.

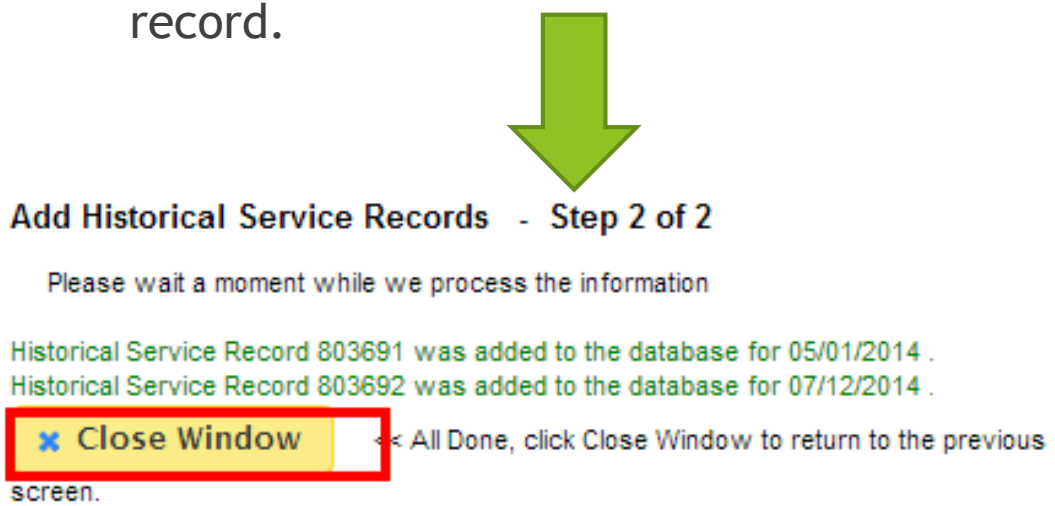
Add Reset Close Window & Don't ADD new record

Scenario 2:Historical Service Records Continued

- Add dates from JFS form to boxes
- Special note about the first date – defaults to today, change if necessary.
- To enter date into boxes, either choose correct date on calendar or type in the date as mm/dd/yyyy.
  - 01/01/2013 is the proper format, not 1/1/13. If you type in 1/1/13 the computer literally thinks this is the year 13 AD and will not accept the value
- To save records to PantryTrak, click on Add button
  - If records are entered correctly, green text will appear on screen. Click close window to exit record.







Historical Service

- After returning to at the top of the page, there will be a tab that says Served Last, check the date on the tab and the last date entered from JFS form should be at the top.
- If there is no date, click on service history and add dates.
- If the correct date is there, close window.

Main | E-Signature | Served Last on: 07/22/2014 | Additional Info | Notes | Family Members | System Info | Help

Bravo, Johnny

Bravo | Johnny

3450 Cartoon Blvd.
88701 << (Zip Code lookup for City, State, County)
Mos Eisley, PT | Empire

Main Phone: 768-998-0001
2nd Phone:

Close Window | Reload

Family NOTES:
Proxy:

Pantry - Choice - 3 day
Food Pantry +

Family Size
5

How did they sign?
Signed Paper Form | Signed Electronic Form | Not Required | Required, NOT Signed

Print FORM | Print w/ date

First Name	Middle	Last Name	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Identification	Status
Johnny		Bravo	08/17/1979	34	25 - 34	F M	Needed Verified	
Adult1		Bravo		35	35 - 59	F M	Needed Verified	Active Inactive
Child1		Bravo		10	5 - 17	F M	Needed Verified	Active Inactive
Child2		Bravo		10	5 - 17	F M	Needed Verified	Active Inactive
Child3		Bravo		10	5 - 17	F M	Needed Verified	Active Inactive

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

"Take-a-Number" tracker (optional) Client's # in line - 0 | Choose Serving Status

Service Visit Date & Time
08/11/2014 at 12:00 PM

Family Status
New Family Previously Served

Close Window | Reload

Close Window & Add Another Service for this same family

Historical Service Records Continued

- To see what you've added from the JFS form, re-search for client.
- After you find the client, under the Last Served column you should see the last service date you've entered in PantryTrak.

Start typing Last Name OR last 4 digits of Phone or Cell OR **part of Last Name, part of First Name** (comma in between).

clue | Clear the Search | Address Search >>

NOT FOUND? Click here >> ADD NEW Family & Reservation (Old style entry screen >> ADD NEW Family & Reservation)

Found 1 matches - Hover over the links to see more information. Clicking the link will add the reservation immediately.

Name	Family ID	Last Served	Address	City	Phone	Merge?
Clue, Blue	1000671268	07/12/2014	2344 Nick Way (88803)	Emerald City	443-787-9803	

- If you can't find a family you know you've added contact your Foodbank. It can be easily fixed, but can only be done by an administrator.

Results of adding JFS forms data to PantryTrak

- Fully searchable database of your clients
- Full report on the services you have performed.
- Easier registration at future distributions.

Please Remember

- All reporting information is only as accurate as the information provided.
- Duplicate client records will lead to duplication in service statistics
- Using placeholder information instead of birthdates, ages, or gender will provide inaccurate age and gender data
- Reports will not include service statistics for paper JFS forms unless the information is entered into PantryTrak