

Household Already In Pantry Trak

1. Sign In www.pantrytrak.com

A. Sign In with Username
and Password



B. Click on Yellow Box to start

2. Search

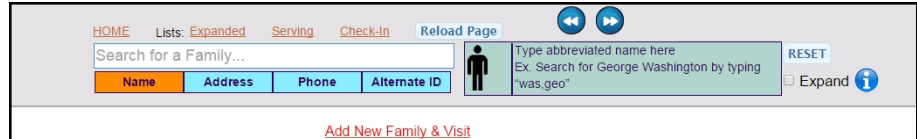
By

Name: - 3 letters of last name (space)

3 letters of first name

Address: Any part of address (numbers or street name)

Phone: Last four digits



3. Select Household

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
Osbourne, Ozzy		789 Crazy Train	#103 Bedford Falls, PT	88801	12/09/2015	123-456-7890	<input checked="" type="checkbox"/>
Osbourne, Ozzy		1234 Street	Lot 7 Bedford Falls, PT	88801	12/11/2015	555-182-7643	<input checked="" type="checkbox"/>

A. Click on correct person's name

B. Click boxes to Merge records that you believe are the same household

4. Confirm Household Info

Confirm:

Osbourne, Ozzy

Last: Osbourne, First: Ozzy, Middle: , Suffix:
 Address 1: 789 Crazy Train, Address 2: #103
 Zip Code: 88801, City: Bedford Falls, State: PT, County: Barrymore County
 Main Phone: 123-456-7890, 2nd Phone:
 OPTIONAL Address Verified: No Yes

Family Size: 4, Children: 0, Adults: 1, Seniors: 3

Family Notes: likes bats; paleo diet

Proxy: Tony Iommi

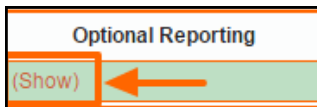
A. address,

B. phone,

C. number of people in household

D. and proxy (if any)

5. Serve



Date & Time		Optional Reporting	
01/08/2016	at 12:00 PM	(Hide)	
Pieces	3	Pounds	80
Dollars		Description	

A. Click "Show" button

B. Record the number of boxes and bags as "Pieces" and the total lbs given in "Pounds"

6. Sign

Paper

OR

E-Signature



HOW DID THEY SIGN?
 Signed Paper Form Signed Electronic Form Not

SERVICE VISIT STATUS:
 Reserved Served No Show Cancelled by Client

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

Read the following statement carefully, then type Your Initials as Your Electronic Signature and click the "I Agree" button.

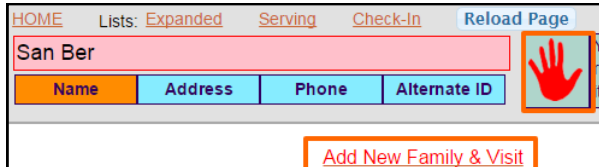
I certify that my current gross household income is at or below the income listed on this form.
 I also certify that, as of today, 01-11-2016, my household lives in the area served by this agency.
 Program officials may verify what I have certified to be true.
 I understand that making a false certification 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.
 I understand that an electronic signature has the same legal effect and can be enforced in the same way as a written signature.

Name of Person Signing: Osbourne, Ozzy Date: 01-11-2016 Initials: I Agree Household Position: Head of Household

Adding a Household

1. Search and Add

A. If red hand appears, name is not in the system



HOME Lists: Expanded Serving Check-In Reload Page

San Ber

Name	Address	Phone	Alternate ID
Add New Family & Visit			

B. Click on "Add New Family & Visit"

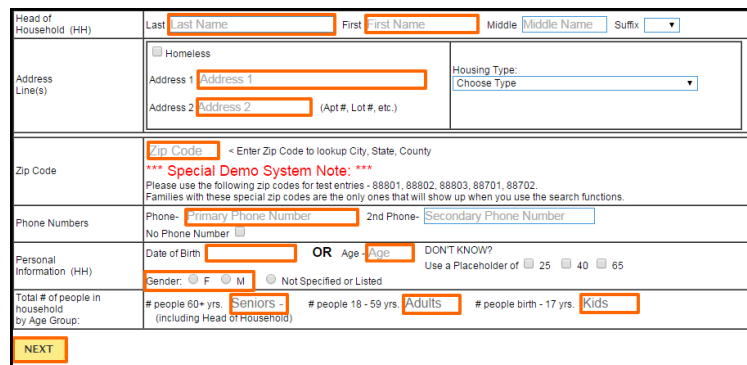
2. Complete Head of Household Info

A. Complete as much information as you have

B. Each section has to have some information

C. For Age group, enter a zero if there are no Members of the family in that age category

D. Click the "Next" button when finished



Head of Household (HH)

Last Last Name First First Name Middle Middle Name Suffix

Homeless

Address Line(s)

Address 1 Address 1 Housing Type: Choose Type

Address 2 Address 2 (Apt #, Lot #, etc.)

Zip Code

Zip Code * Enter Zip Code to lookup City, State, County

*** 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- Primary Phone Number 2nd Phone- Secondary Phone Number

No Phone Number

Personal Information (HH)

Date of Birth OR Age- Age DONT KNOW? Use a Placeholder of 25 40 65

Gender: F M Not Specified or Listed

Total # of people in household by Age Group:

people 60+ yrs. SENIORS - # people 18 - 59 yrs. Adults # people birth - 17 yrs. Kids

NEXT

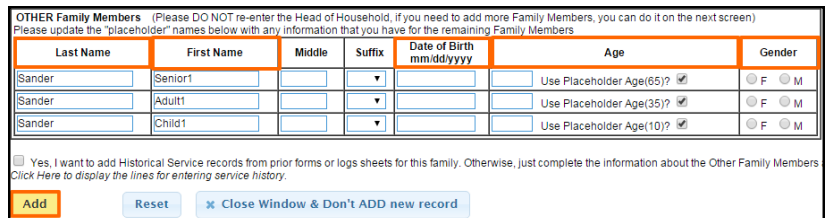
3. Complete Family Information

A. Complete as much information as you have

B. Use date of birth OR age

C. Use placeholder if you don't know age

D. Click "Add" when finished



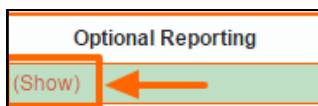
OTHER Family Members (Please DO NOT re-enter the Head of Household, if you need to add more Family Members, you can do it on the next screen) Please update the "placeholder" names below with any information that you have for the remaining Family Members

Last Name	First Name	Middle	Suffix	Date of Birth mm/dd/yyyy	Age	Gender
Sander	Senior1				Use Placeholder Age(65)? <input checked="" type="checkbox"/>	<input type="radio"/> F <input type="radio"/> M
Sander	Adult1				Use Placeholder Age(35)? <input checked="" type="checkbox"/>	<input type="radio"/> F <input type="radio"/> M
Sander	Child1				Use Placeholder Age(10)? <input checked="" type="checkbox"/>	<input type="radio"/> F <input type="radio"/> 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


4. Serve



Optional Reporting

(Show) ←

A. Click "Show" button



Date & Time	Optional Reporting
01/08/2016 at 12:00 PM	(Hide)
Pieces 3 Pounds 80 Dollars Description	

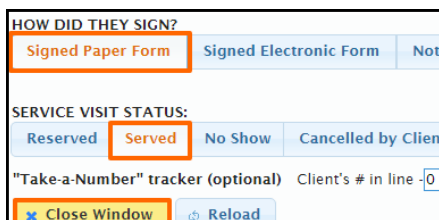
B. Record the number of boxes and bags as "Pieces" and the total lbs given in "Pounds"

5. Sign

Paper

OR

E-Signature



HOW DID THEY SIGN?

Signed Paper Form Signed Electronic Form Not

SERVICE VISIT STATUS:

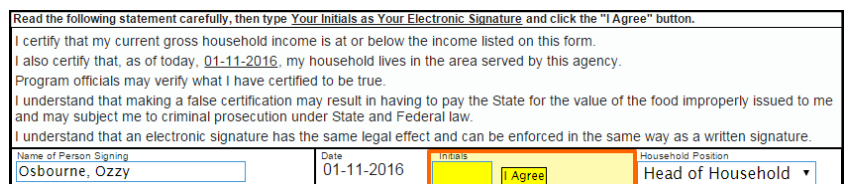
Reserved Served No Show Cancelled by Client

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

Close Window Reload



Main E-Signature Served Last on:



Read the following statement carefully, then type Your Initials as Your Electronic Signature and click the "I Agree" button.

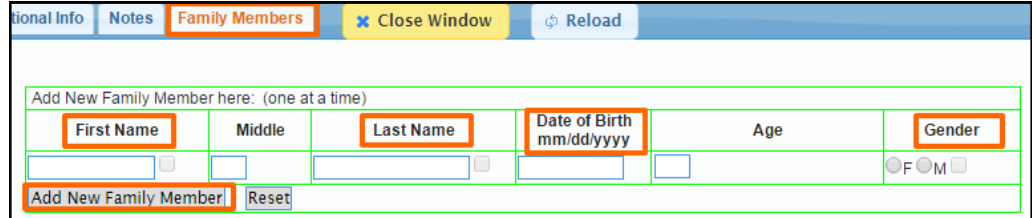
I certify that my current gross household income is at or below the income listed on this form.
I also certify that, as of today, 01-11-2016, my household lives in the area served by this agency.
Program officials may verify what I have certified to be true.
I understand that making a false certification 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.
I understand that an electronic signature has the same legal effect and can be enforced in the same way as a written signature.

Name of Person Signing Date Initials Household Position

Osbourne, Ozzy 01-11-2016 I Agree Head of Household

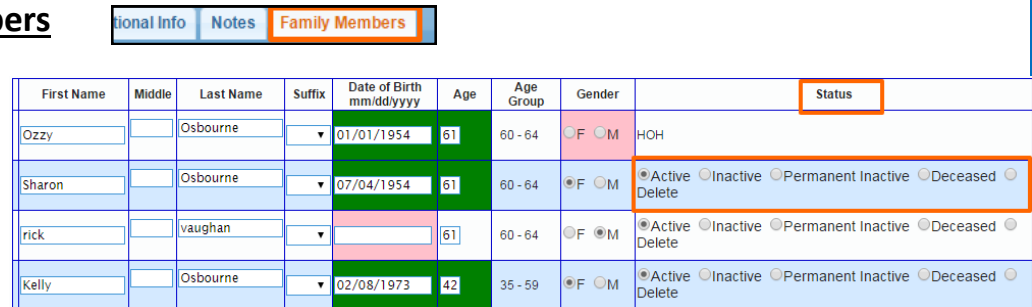
Adding Family Members

- Click on "Family Members" tab at top of screen
- Enter all information
- Click on "Add New Family Member"



Inactivating Family Members

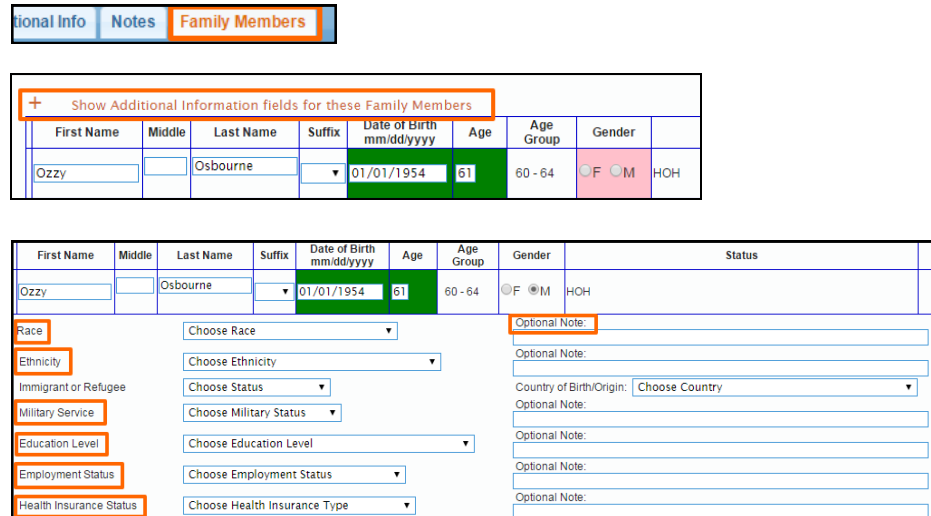
- Click on "Family Members" tab at top of screen
- Scroll towards bottom of screen
- Under "Status" column, select correct category



First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Status
Ozzy		Osbourne		01/01/1954	61	60 - 64	<input type="radio"/> F <input type="radio"/> M	HOH
Sharon		Osbourne		07/04/1954	61	60 - 64	<input checked="" type="radio"/> F <input type="radio"/> M	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Permanent Inactive <input type="radio"/> Deceased <input type="radio"/> Delete
rick		vaughan			61	60 - 64	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Permanent Inactive <input type="radio"/> Deceased <input type="radio"/> Delete
Kelly		Osbourne		02/08/1973	42	35 - 59	<input checked="" type="radio"/> F <input type="radio"/> M	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Permanent Inactive <input type="radio"/> Deceased <input type="radio"/> Delete

Adding Client Demographics

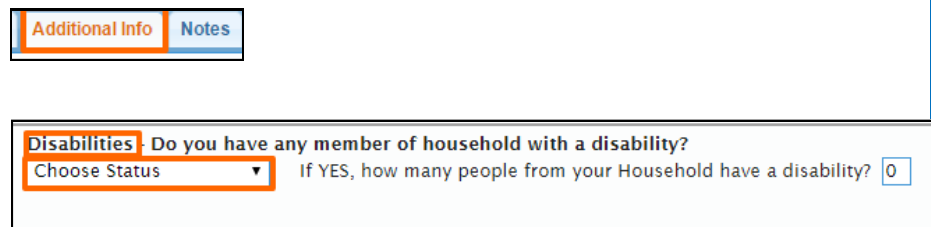
- Click on "Family Members" tab
 - Click on "+ Show Additional Information fields..."
 - You can document Race, Ethnicity, Military Service, Education Level, Employment Status and Health Insurance Status
- REMEMBER: ALL information is VOLUNTARY**
- AZ will **NOT** ask Immigrant or Refugee Status



- All responses are chosen from drop down menu
- You may document optional notes if you choose, i.e. name of tribe, how many jobs a person has, school status, etc.

Adding Disability Status

- Click on "Additional Info" tab at the top of the screen
- "Disabilities" appears 1/2 way down
- Choose from drop down menu. Information is VOLUNTARY





Pantry Trak Desktop Aid



Merge Request

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
2 Families that You Have Served							
Osbourne, Ozzy		789 Crazy Train #103	Bedford Falls, PT	88801	12/01/2015	123-456-7890	<input checked="" type="checkbox"/>
Osbourne, Ozzy		1234 Street Lot 7	Bedford Falls, PT	88801	12/11/2015	555-182-7643	<input checked="" type="checkbox"/>
Osbourne, Ozzy (Osbourne, Sharon - HOH)		1234 Street Lot 7	Bedford Falls, PT	88801	12/02/2015	480-123-4567	<input checked="" type="checkbox"/>

- A. If you believe that multiple entries are the same household; request a Merge
- B. Make sure to click on all files that you would like to merge together

Voiding Duplicate Entries

- A. If you have two entries for the same person on the same day, void an entry for accurate reporting
- B. Click on the visit number you wish to void

817754	Lang, Cathy	343 Main Street	ELYRIA, OH	LORAIN	44035	3 + 1 = 4	Served	11:00 AM
817770	Osbourne, Ozzy	1234 Street Lot 7	Bedford Falls, PT	Barrymore	88801	0 + 3 = 3	Served	04:00 PM
817771	Osbourne, Ozzy	1234 Street Lot 7	Bedford Falls, PT	Barrymore	88801	0 + 3 = 3	Reserved	10:00 AM
817759	Ramone, Joey	55rd And 3rd Streets	Emerald City, PT	Barrymore	88803	0 + 7 = 7	Served	11:00 AM

- C. Once on the Main tab, scroll to bottom of page for "Service Visit Status" and click on "Duplicate Void"

SERVICE VISIT STATUS:

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

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

Close Window
Reload
Close Window & Add ANOTHER Service for this

- D. Once back on client list for day, click on "Reload Page" at top of screen
- E. Visit number and entry should now appear in red



817770	Osbourne, Ozzy	1234 Street Lot 7	Bedford Falls, PT	Barrymore	88801	0 + 3 = 3	Served	04:00 PM
817771	Osbourne, Ozzy	1234 Street Lot 7	Bedford Falls, PT	Barrymore	88801	0 + 3 = 3	Duplicate void	10:00 AM
817759	Ramone, Joey	55rd And 3rd Streets	Emerald City, PT	Barrymore	88803	0 + 7 = 7	Served	11:00 AM