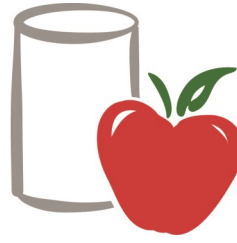


Greater Pittsburgh
**community
food bank**



MEMBER OF
**FEEDING
AMERICA**

PantryTrak Registration Guide

Use this manual to register families on the day of your distribution.



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Important Note:

Please do not contact Mid-Ohio Foodbank for assistance. Call any member of the Network Development team at GPCFB and we will be happy to help.

Call 412-460-3663

Eliza Kuhn: extension 408

Brian Zeisloft: extension 219

Laura Officer: extension 233

Phylliss Johnson: extension 222


Marlene Gary Hogan: extension 308

Suzanne Smith: extension 230

Charlese McKinney: extension 284

Logging In

1. Open your internet browser (Google Chrome, Internet Explorer, Safari, etc.)
2. Type <https://secure.pantrytrak.com> in the URL line
3. Click “Member Login”
4. Enter User Name and Password (this can be found in your training manual)
5. Click “LOGIN”



Welcome to PantryTrak.com - Food Pantry management tools
Being developed by Pantry Managers, for Pantry Managers....

Please enter your User Name and Password -

User Name

Password

LOGIN


For users with authorized access to the Demo system, please use the following link - demo.pantrytrak.com


System Notes:


Feel free to use any browser you would like... some good choices of secure/fast browsers are - **Firefox, Chrome, Safari**, etc. You will need to make sure that Javascript is enabled in your browser settings. If you do experience problems with the site using Internet Explorer, you may want to give [Firefox](#) or [Chrome](#) a try. Both are free and easy to install.

WARNING!!!! UNAUTHORIZED ACCESS PROHIBITED
You must have authorized permission to access this area. All actions are monitored, recorded, and reported.

PantryTrak is being developed and supported through the leadership of Mid-Ohio Foodbank, for more information please contact Mark Mollenkopf, mmollenkopf@midohiofoodbank.org, or call 614-317-9450.



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Home Screen

You will be directed to the home screen after logging in. This screen is your portal to PantryTrak—you can add new families, conduct registration at your distribution, and generate statistics reports from this screen. Click “HOME” at any time to return to this screen.



West Hills Food Pantry
User: Sandy Hershberger - Pantry Director

HOME QUICK ADD LOGOUT

Main Menu	
Manager Tools	Manage All ID Types eSignature Audit
Service History Lookup	(to add NEW records, use the correct date from the list below, or use Quick Add) History Lookup
REPORTS	- Agency Stats Report ** NEW ** Analysis & Learning Center Main Pantry Report Include Produce
HELP DESK	Help Desk & Knowledge Base (ask for Help and find Answers about PantryTrak) PT Help Desk

Serve Families on 06/01/2016

Jump to day

Select Event:

Choose a Date:

Submit

Pantry

Searching for Families

When you are using PantryTrak at your distribution, the easiest way to begin registering your families is to look halfway down the screen for the section that says “Serve Families on...” which pre-populates today’s date. Click the yellow button that says “Pantry.”

Main Menu	
Manager Tools	Manage Alt ID Types eSignature Audit
Service History Lookup	(to add NEW records, use the correct date from the list below, or use Quick Add) History Lookup
REPORTS	- Agency Stats Report ** NEW ** Analysis & Learning Center Main Pantry Report Include Produce
HELP DESK	Help Desk & Knowledge Base (ask for Help and find Answers about PantryTrak) PT Help Desk

Serve Families on 06/01/2016

Pantry

Jump to day

Select Event: Pantry

Choose a Date: 06/01/2016

Submit

You will start searching for your families on the screen below. Most of your current families should be in the system by now. As you register your families, their service record for today will show up under the Service Visit list below.

HOME Lists: [Expanded](#) [Serving](#) [Check-In](#) [Serving/Check-In](#) [Offline](#) [Reload Page](#)

Search for a Family... RESET

Name	Address	Phone	Alternate ID
	Type abbreviated name here Ex. Search for George Washington by typing "was_geo"		

Expand i

[Add New Family & Visit](#)

Service Visit list for Wednesday 06/01/2016 , Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes

Type in the last name of the head of household. If the family for which you are searching does not appear, refer to page eight of your training manual to add a new family.

HOME Lists: [Expanded](#) [Serving](#) [Check-In](#) [Serving/Check-In](#) [Offline](#) [Reload Page](#)

Novack RESET

Name	Address	Phone	Alternate ID
	Name Not Found		

Expand i

[Add New Family & Visit](#)

Service Visit list for Monday 05/30/2016 , Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes

e-Signature

The e-Signature function replaces the annual TEFAP Self-Declaration of Need form, and the monthly sign-in sheet. Families will e-Sign at each distribution, combining the requirements for TEFAP and a monthly signature. **If your agency does not want to use the e-Signature function, go to page 6 to review additional steps required for registration.**

Click on the e-signature tab. PantryTrak will produce a current copy of the TEFAP form, pre-populated with the family's and your agency's information.

**Bureau of Food Distribution
The Emergency Food Assistance Program
(TEFAP)
"Self-Declaration of Need"
Effective July 1, 2016 to June 30, 2017
ELECTRONIC SIGNATURE FORM**

Children (0-17) - 0
Adults - 1
Seniors (60 and up) - 1

Officer: Laura
Recipient Name: _____
1 NORTH LINDEN STREET
Street Address: _____
DUQUESNE PA 15110
City State Zip: _____

Agency Representative Signature: Charles McKinney
Date: 07-06-2016
GPCFB-Monday Market
Distribution Site Name: _____
Number: 1
1 N LINDEN ST, DUQUESNE PA 15110
Distribution Site Location: _____

Household Size	Total Household Income (based on 150% of Poverty)		
	Annual	Monthly	Weekly
1	\$ 17,930	\$ 1,495	\$ 343
2	\$ 24,030	\$ 2,003	\$ 462
3	\$ 30,240	\$ 2,520	\$ 582
4	\$ 36,450	\$ 3,038	\$ 701
5	\$ 42,660	\$ 3,555	\$ 820
6	\$ 48,870	\$ 4,073	\$ 940
7	\$ 55,095	\$ 4,591	\$ 1,060
8	\$ 61,335	\$ 5,111	\$ 1,180
Add On	\$ 6,240	\$ 520	\$ 120

I Agree

Place the cursor in the yellow box, and have the family read through the TEFAP form. If the Head of Household is picking up food, have that individual type their initials in the yellow box.

If a proxy or another family member is picking up food, select the appropriate option and type in the person's name.

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: Johnson, Phylliss
Date: 07-06-2016
Initials: I Agree
Household Position: Head of Household
Head of Household Household Member
Proxy

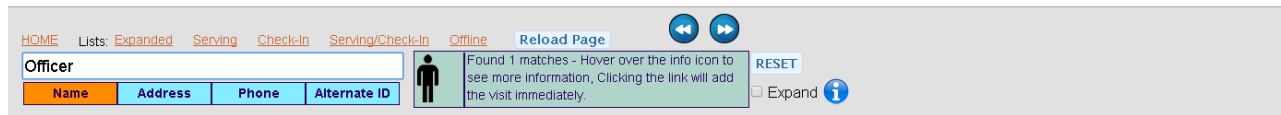
Click the "I Agree" button to complete the e-signature process. **If the family completed the e-Signature, the record for that day will be automatically marked as "Served."** You can close the window and register your next family.

Important: The e-signature function combines the TEFAP form and the Monthly Sign-In Sheet. Agencies using e-signature are able to go paperless. Your families should complete the e-signature at every distribution.

Registration without the e-Signature

If you are not using the e-Signature function, you must continue to have families sign for their food on the monthly sign-in sheet. Follow the instructions below to register your families without the e-signature.

1. Search for the family by typing the last name into the search bar.
2. If the family for which you are searching appears, hover over the  button to view basic household information.




HOME Lists: Expanded Serving Check-In Serving/Check-In Offline Reload Page



Officer

Found 1 matches - Hover over the info icon to see more information, Clicking the link will add the visit immediately.

RESET

Expand 

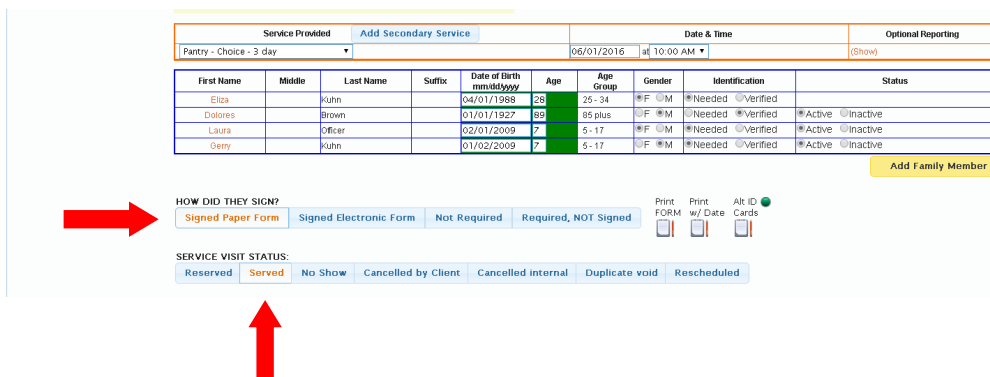
Name	Address	Phone	Alternate ID
Officer, Laura	1 NORTH LINDEN STREET	412-460-3663	

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
Officer, Laura		1 NORTH LINDEN STREET	DUQUESNE, PA	15110	05/23/2016 	412-460-3663	<input type="checkbox"/>

If the record has the same name but a different address, ask if the person previously lived at that address. If it is not the same family, go to page eight in the **training manual** to add a new family. If it is the same family, click on the name to begin registration.

There are three easy steps to register the family.

1. Verify that all information on the household card is correct (veteran status, SNAP status, disability)
2. Click “Signed Paper Form” when the family member has signed the monthly sign-in sheet.
3. Click “Served” to ensure this family is included in your monthly statistics report.



Service Provided: Add Secondary Service

Date & Time: 06/01/2016 at 10:00 AM

Optional Reporting: (Show)

First Name	Middle	Last Name	Suffix	Date of Birth (mm/dd/yyyy)	Age	Age Group	Gender	Identification	Status
Elica		Kuhn		04/01/1988	28	25 - 34	F	<input type="checkbox"/> Needed <input type="checkbox"/> Verified	<input type="checkbox"/> Active <input type="checkbox"/> Inactive
Dolores		Brown		01/01/1927	89	85 plus	F	<input type="checkbox"/> Needed <input type="checkbox"/> Verified	<input type="checkbox"/> Active <input type="checkbox"/> Inactive
Laura		Officer		02/01/2009	7	5 - 17	F	<input type="checkbox"/> Needed <input type="checkbox"/> Verified	<input type="checkbox"/> Active <input type="checkbox"/> Inactive
Gem		Kuhn		01/02/2009	7	5 - 17	F	<input type="checkbox"/> Needed <input type="checkbox"/> Verified	<input type="checkbox"/> Active <input type="checkbox"/> Inactive

Add Family Member

HOW DID THEY SIGN?
 Signed Paper Form Signed Electronic Form Not Required Required, NOT Signed

Print FORM Print w/ Date Alt ID Cards

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

It is important that you remember to click “Served.” The default setting is “Reserved,” and without changing the status manually this family’s service record will not be included in your pantry report.

Checking for Accuracy

After checking in your first family, you will be taken back to the service list screen (see below).

HOME Lists: Expanded Serving Check-In Serving/Check-In Offline Reload Page

Search for a Family... [Name] [Address] [Phone] [Alternate ID] [Person Icon] Type abbreviated name here Ex. Search for George Washington by typing "was,geo" [RESET] [Expand] [Info]

[Add New Family & Visit](#)

Service Visit list for Wednesday 06/01/2016 , Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes

If you refresh your web browser, you will notice that the family you just checked in now appears on the service list (see below) Use this function to double check your work.

HOME Lists: Expanded Serving Check-In Serving/Check-In Offline Reload Page

Search for a Family... [Name] [Address] [Phone] [Alternate ID] [Person Icon] Type abbreviated name here Ex. Search for George Washington by typing "was,geo" [RESET] [Expand] [Info]

[Add New Family & Visit](#)

Service Visit list for Wednesday 06/01/2016 , Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
6329810	Kuhn, Eliza	1 NORTH LINDEN STREET	2 DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served	10:00 AM	Signed Paper	[Info]

If the family record is highlighted GREEN, it means you registered them correctly. If the record is WHITE, it means the default status of "Reserved" was not changed to "Served." Go to the next page to correct this action.

HOME Lists: Expanded Serving Check-In Serving/Check-In Offline Reload Page

Search for a Family... [Name] [Address] [Phone] [Alternate ID] [Person Icon] Type abbreviated name here Ex. Search for George Washington by typing "was,geo" [RESET] [Expand] [Info]

[Add New Family & Visit](#)

Service Visit list for Wednesday 06/01/2016 , Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
6339810	Kuhn, Eliza	1 NORTH LINDEN STREET	2 DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served	10:00 AM	Signed Paper	[Info]
6343845	Officer, Laura	1 NORTH LINDEN STREET	DUQUESNE, PA	ALLEGHENY	15110	0 + 2 = 2	Reserved	01:00 PM		

It is easy to forget to click "Served." To make changes to the service visit, click on the "Service Visit #" for the record you want to edit.

HOME Lists: Expanded Serving Check-In Serving/Check-In Offline Reload Page

Search for a Family... [Name] [Address] [Phone] [Alternate ID] [Person Icon] Type abbreviated name here Ex. Search for George Washington by typing "was,geo" [RESET] [Expand] [Info]

[Add New Family & Visit](#)

Service Visit list for Wednesday 06/01/2016 , Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
6339810	Kuhn, Eliza	1 NORTH LINDEN STREET	2 DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served	10:00 AM	Signed Paper	[Info]
6343845	Officer, Laura	1 NORTH LINDEN STREET	DUQUESNE, PA	ALLEGHENY	15110	0 + 2 = 2	Reserved	01:00 PM		

Checking for Accuracy, continued

Change the Service Visit Status to “Served.”

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Identification	Status
Laura		Officer		12/25/1985	30	25 - 34	<input checked="" type="radio"/> F <input type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	
Brian		Zeisloft		12/25/1920	95	85 plus	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive

[Add Family Member](#)

HOW DID THEY SIGN?
[Signed Paper Form](#) [Signed Electronic Form](#) [Not Required](#) [Required, NOT Signed](#)

Print FORM Print w/ Date Alt ID Cards

SERVICE VISIT STATUS:
[Reserved](#) [Served](#) [No Show](#) [Cancelled by Client](#) [Cancelled internal](#) [Duplicate void](#) [Rescheduled](#)



Hit the “Close Window” button and refresh your browser to see your changes.

HOME Lists: [Expanded](#) [Serving](#) [Check-In](#) [Serving/Check-In](#) [Offline](#) [Reload Page](#)

Search for a Family... [RESET](#)

[Name](#) [Address](#) [Phone](#) [Alternate ID](#) Expand [i](#)

Type abbreviated name here
Ex. Search for George Washington by typing "was,geo"

[Add New Family & Visit](#)

Service Visit list for Wednesday 06/01/2016 , Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
8339810	Kuhn, Eliza	1 NORTH LINDEN STREET	2 DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served	10:00 AM	Signed Paper	i
6343845	Officer, Laura	1 NORTH LINDEN STREET	DUQUESNE, PA	ALLEGHENY	15110	0 + 2 = 2	Served	01:00 PM	Signed Paper	



Repeat the same steps to register the rest of your families.

Errors

Registering a family twice

Internet connectivity issues can sometimes cause PantryTrak to react more slowly than usual. Some agencies have accidentally registered the same family twice. If this occurs, click on one of the “Service Visit #’s” for that family and change the status to “Duplicate Void.”

Accidentally registering the wrong family

You cannot delete a family once you have registered them, but you can remove them from your statistics. Click on the “Service Visit #” for the family that was registered accidentally, and click “Cancelled Internal” in the status section.

IMPORTANT NOTE: Double check for accuracy by closing the window and refreshing. The line should become PINK. Refer to the Frequently Asked Questions guide for more assistance.