

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"

PANTRY	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 2222-1	For users with authorized access to the Demo system, please use the following link - demo pantrytrak.com
Password	System Notes:
Feel free to use any You will need to mak problems with the sit	r browser you would like some good choices of secure/fast browsers are - Firefox, <u>Chrome</u>, Safari , etc. ie sure that Javascript is enabled in your browser settings. If you do experience ie using internetExplorer, you may want to give <u>Firefox</u> or <u>Chrome</u> a try. Both are free and easy to install.
WARNING!!!! UNAUT You must have auth	THORIZED ACCESS PROHIBITED prized permission to access this area. All actions are monitored, recorded, and reported.
PantryTrak is being information please (developed and supported through the leadership of Mid-Ohio Foodbank, for more contact Mark Mollenkopf, mmollenkopf at middhiofoodbank.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.

H	West Hills Food Pantry User: Sandy Hershberger - Pantry Director
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
Sen	ve Families on 06/01/2016 Jump to day
	Select Event: Pantry Pantry Choose a Date: 06/01/2016 Submit

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 f	ind Answers about PantryTrak) PT Help Desk
Serve	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: Expande	ed Serving Chec	: <u>k-In Serving/</u>	Check-In Offline	Reload Page							
Search for a Family	/		Type at	breviated name here	RES	ET					
Name Add	ress Phone	Alternate	ID II "was,ge	:0"	D E	opand 🧲					
	Add New Family & Service Visit list fo	<u>Visit</u> r Wednesday 0	6/01/2016 , 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: Expande	ed Serving Che	:k-In Serving/	<u>Check-In</u> <u>Offline</u>	Reload Page	•						
Novack			Name N	ot Found	RESE	т					
Name Add	ress Phone	Alternate			O Ex	pand 🧲					
	Add New Family 8	Visit									
	Service Visit list fo	r Monday 05/30	/2016 , Pantry								
	Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes

<u>e-Signature</u>

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.

Dennes	Ivania	E The Eme	Sureau of Food I ergency Food A (TEFAI	Distribution ssistance Program P)	Children (Ai Seniors (60 an	(0-17) - 0 dults - 1 d up) - 1	
DEPARTMENT OF	AGRICULTURE	Effect	"Self Declaratio ive July 1, 2016	n of Need" to June 30, 2017 ATURE FORM			
Officer, Laura			Charles	e McKinney	07-0	06- 6	
Recipient Name			Agency R	epresentative Signature	Date		
1 NORTH LINDEN	STREET		GPCFE	3-Monday Market	GPC 1	CF2436-	
Street Address			Distributio	on Site Name	Numi	ber	
DUQUESNE PA	15110		1 N LIN	DENIST DUQUESNE F	A 15110		
		Total Househ	old Income (based or	150% of Poverty)			7
Household	I Size	Total Househ	old Income (based or Annual 17.820	150% of Poverty) Monthly \$ 1.485	s	Weekly 343	
Household	1 Size	Total Househ	old Income (based or Annual 17,820 24,030	150% of Poverty) Monthly \$ 1,485 \$ 2,003	۷ \$	Weekly 343 462	
Household	1 Size 2 3 4	Total Househ	old Income (based or Annual 17,820 24,030 30,240 36,450	Monthly Monthly \$ 1,485 1,485 \$ 2,003 \$ 2,520 \$ 3,038 \$ 3,038	۷ 5 5	Neekty 343 462 582 701	
Household	1 2 3 4 5	Total Househ	old Income (based or Annual 17,820 24,030 30,240 36,450 42,660	Monthly \$ 1,485 \$ 2,003 \$ 2,520 \$ 3,038 \$ 3,555	۷ چ چ چ	Meekly 343 462 582 701 820	
Household	1 Size 2 3 4 5 6 7	Total Househ	old Income (based or Annual 17,820 24,030 30,240 36,450 42,860 48,870 55,005	Manthly Manthly \$ 1,485 \$ 2,003 \$ 2,520 \$ 3,038 \$ 3,555 \$ 4,073	\$ \$ \$ \$ \$	Neekly 343 462 582 701 820 940	
Household	1 Size 1 2 3 4 5 6 7 8	Total Househ	old Income (based or Annual 27,820 24,030 30,240 36,450 42,660 42,660 48,870 55,095 61,335	156% of Povertyj Manthby \$ 1,485 \$ 2,003 \$ 2,520 \$ 3,038 \$ 3,555 \$ 4,073 \$ 4,591 \$ 5,111	\$ \$ \$ \$ \$ \$ \$ \$	Neekly 343 462 582 701 820 940 1,060 1.180	
Household	1 Size 2 3 4 5 6 7 8 Add On	Total Househ	and Income (based or Annual 17,820 24,030 30,240 36,450 42,660 48,870 55,095 61,335 \$6,240	150% of Poverty) Manthay \$ 1,485 \$ \$ 2,003 \$ \$ 2,520 \$ \$ 3,038 \$ \$ 4,591 \$ \$ 5,511 \$ \$ 5,201 \$	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Neekty 343 462 582 701 820 940 1,060 1,180 120	
Household	1 Size 1 2 3 4 5 6 7 8 Add On ment carefully, then typ	Total Househ g g g g g g g g g g g g g g g g g g g	eld liccurse (based or Annual; 17,820 24,030 36,450 36,450 42,660 48,870 55,095 61,335 6,240	I 50% of Poverty) Manthay \$ 1,485 \$ \$ 2,003 \$ \$ 2,520 \$ \$ 3,038 \$ \$ 4,073 \$ \$ 4,591 \$ \$ 5,201 \$ \$ 5,201 \$ \$ 5,201 \$ \$ 5,201 \$	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Meekly 343 462 582 701 820 940 1,060 1,180 120	
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Read the following state Understand the house household lives in the assistance. UNDERSTAND THAT ME TO CRIMINAL PR	1 Size 1 2 3 4 5 6 7 8 Add On ment carefully then by ehold income limitati area served by Pen MAKING A FALSE COSECUTION UNDE	Total Househ 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	old locome (based or Annual 17,820 24,030 30,240 36,450 42,660 42,860 55,095 61,335 6,240 Your Electronic Sima certify that my hou Emergency Food AY RESULT IN MY EDERAL LAW.	150% of Powerty Nonthly \$ 1.485 \$ 2.003 \$ 2.003 \$ 2.003 \$ 3.038 \$ 3.038 \$ 3.055 \$ 4.073 \$ 5.511 \$ 5.20	ten.	Meekly 343 462 582 582 701 820 940 1,060 1,180 120 120	n the program. I also cettry that, as of teted in connection with the receipt of Fie DPPERLY ISSUED TO ME AND MAY SU
Read the following state	Size 1 2 3 4 5 6 7 Add On ment carefully, then by eholol income limitat area served by Pen I' Makking A FALSE OSECUTION UNDE	Total Househ 9 9 9 9 9 9 9 9 9 9 9 9 9	old lacome (based or Annual) 17,820 24,030 30,240 32,450 32,450 32,450 42,860 48,870 55,095 61,335 61,335 certify that; my ho, e Emergency Food AY RESULT IN MY FEDERAL LAW. gal effect and can b	150% of Powthy 1005 \$ 1005 1005 \$ 2000 2000 \$ 2000 2000 \$ 2000 2000 \$ 4073 4.591 \$ 5100 520 bitsetine Program. This cases and cick the "Agere" for Assistance Program. This cases and cick the "Agere" for Assistance Program. This cases and cick the "Agere" for Assistance Program. This cases are also as a set of the same way to be a set of the set of the same way t	ter.	Meskly 343 462 582 582 701 820 940 940 1,060 1,060 1,20 ticipation in ing comple oD IMPRC re.	n the program. I also cettly that, as of teted in connection with the receipt of F6 OPPERLY IBSUED TO ME AND MAY SU
Read the following states Understand the host of the assistance. UNDERSTANDE THAT ME TO CRIMINAL PRO- LINDERSTANDE THAT ME TO CRIMINAL PRO- LINDER	1 Size 1 3 4 5 6 7 8 Add On ment carefully, then by ehold income inntati area served by Pen I MAKING A FALSE IOSECUTION UNDE leactronic signature I	Total Househ	Hold Income (based or Annual 17,820 24,030 30,240 36,450 42,660 42,660 55,095 61,335 56,040 90,240 24,060 42,660 42,860 55,095 61,335 5,240 Your Electronic Sizes certify that my hot, e Emergency Food AY RESULT IN MY repersent Law, and effect and can be apple 20,015	150% of Powerty 1465 \$ 1465 \$ 2033 \$ 2,520 \$ 3,038 \$ 2,555 \$ 4,073 \$ 5,551 \$ 4,073 \$ 5,520 \$ 5,521 \$ 5,521 \$ 4,073 \$ 5,520 <td< td=""><td>ten. Se me eligible for pare VALUE OF THE FOI sa a written signatur Paston</td><td>Meekly 343 462 582 582 701 820 940 940 1,180 1,20 120</td><td>n the program. I also cettly that, as of t teta in connecton with the receipt of Fe OPERLY IBSUED TO ME AND MAY SUI</td></td<>	ten. Se me eligible for pare VALUE OF THE FOI sa a written signatur Paston	Meekly 343 462 582 582 701 820 940 940 1,180 1,20 120	n the program. I also cettly that, as of t teta in connecton with the receipt of Fe OPERLY IBSUED TO ME AND MAY SUI

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.

Name of Person Signing	Date	Initials	Household Position
Johnson, Phylliss	07-06-2016	Agree	Head of Household 🔹
			Head of Household
			Household Member

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 ¹ button to view basic household information.



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 signin sheet.
- 3. Click "Served" to ensure this family is included in your monthly statistics report.



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.

PantryTrak Registration Guide

Checking for Accuracy

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

HOME Lists: Expande	ed Serving Cher	:k-In Serving/	<u>Dheck-In</u> <u>Offline</u>	Reload Page	•						
Search for a Family Name Add	y Iress Phone	Alternate	D Type ab	breviated name here rch for George Washington o"	by typing	et (pand					
	Add New Family & Service Visit list fo	<u>Visit</u> r Wednesday 0	6/01/2016 , 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: Expandi Search for a Family Name Add	ed <u>Serving</u> / ress	<u>Check-in</u>	Serving/Check-In Q	ffline Reload Pa Type abbreviated na Ex. Search for Geor	age ame here ge Washington by typin	g RESET	8					
	Name Address Phone Alternate ID Image: The second se											
	Service Visit #	Name	Add	ress	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
	<u>6339810</u>	Kuhn, Eliza	1 NORTH LINDEN STRE	ET 2	DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served 💆	10:00 AM	Signed Paper	l

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: Expands Search for a Family Name Add	ed <u>Serving</u> y Iress	<u>Check-in</u> Se Phone Alter	Ving/Check-in Offline Reload Page Type abbreviated nar Ex. Search for Georg nate ID "was,geo"	ge 😡 ne here e Washington by typing	RESET	D					
	Add New F	amily & Visit	day 06/01/2016 , Pantry								
	Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
	<u>6339810</u>	Kuhn, Eliza	1 NORTH LINDEN STREET 2	DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served 💆	10:00 AM	Signed Paper	1
	6343845	Officer, Laura	1 NORTH LINDEN STREET	DUQUESNE, PA	ALLEGHENY	15110	0 + 2 = 2	December 2	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: Expande Search for a Family Name Add	d <u>Serving</u> (ress	<u>Check-in</u> Se Phone Alter	nate ID Contract of the International Contract of the Internationa	ge en en here ne here e Washington by typing	RESET	Ð					
	Add New F Service Vis	amily & Visit it list for Wednes	day 06/01/2016 , Pantry								
	Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
	<u>6339810</u>	Kuhn, Eliza	1 NORTH LINDEN STREET 2	DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served 💆	10:00 AM	Signed Paper	L
	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 Birt mm/dd/yyy	h Age /	Age Group	Gender	. Identi	fication	Status		Status
Laura		Officer		12/25/1985	30	25 - 34	●F ●M	I Needed	OVerified			
Brian		Zeisloft		12/25/1920	95	85 plus	⊂F ®M	I Needed	OVerified	●Active	Olnactive	9
	~N/2						Prin	t Drint				Add Family Member
Signed Paper Fo	orm Sign	ned Electronic Form	Not F	Required	Required, N	NOT Signed	FOR	M w/Date (
Reserved Se	rved No	Show Cancelled	now Cancelled by Client		Cancelled internal		Duplicate void		escheduled			
4												

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	/		.	Type abbreviated nam	RESET	RESET							
Name Add	Name Address Phone Alternate ID			"was,geo"	e washington by typing	🗆 Expand 🌔	1						
			Kids,	\\$oit									
	Visit #	Name	Ad	dress	City, State	County	Zip	Adults, Total	Status	Time	Signed	Notes	
	<u>6339810</u>	Kuhn, Eliza	1 NORTH LINDEN STF	REET 2	DUQUESNE, PA	ALLEGHENY	15110	2 + 2 = 4	Served 🞽	10:00 AM	Signed Paper	i	
	6343845	Officer, Laura	1 NORTH LINDEN STR	REET	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.