How to Demo PantryTrak

This guide will walk you through on how to demo PantryTrak and see how the system works.

Website

▶ **To get to Demo PantryTrak, in the address bar type:**

https://demo.pantrytrak.com

Welcome to **DEMO.PantryTrak.com** - Food Pantry management tools

Being developed by Pantry Managers, for Pantry Managers....

Click here for the regular login: >> SECURE.PantryTrak.com

Member Login

(Click above to enter the Demo System)

With the primary goal of fighting hunger by allowing Pantry Staff and Volunteers to maximize service to their clients.
We will do this by:

Minimizing paperwork and improve reporting accuracy

Simplifying the registration and "check-in" processes

Linking Volunteers, Donors, Suppliers, and Food Banks directly to the needs of the clients being served

Food Pantries and Food Banks will benefit from the accurate and timely reporting.
They can use this information to:

Better understand the client needs in real-time

Develop a true un-duplicated count of hungry families/persons in given service area

Use this data to drive advocacy efforts and inform policy makers and stakeholders in the fight against hunger

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

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VERIFIED & SECURED
VERIFY SECURITY

Username and Password

1. Enter the username and password provided by your foodbank and click Login.

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Click here for the regular login: >> SECURE.PantryTrak.com

Please enter your User Name and Password -

User Name

Password

LOGIN

System Note: SUNDAY, MAY 11th. - as you can see the Demo system for PantryTrak has it's own server now. You can still login with the same demo username and password that you had been using.

REGULAR SYSTEM - You can access the regular PantryTrak system here: secure.pantrytrak.com

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 InternetExplorer, 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.

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Main Screen Overview

▶ To practice in demo PantryTrak click on Today's date.

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

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:

Service Visit List

- After clicking on today's date, the Service Visit List will appear.

- This screen may appear with just the search boxes or will have some names in it depending on if someone has been practicing in the system for the day.

HOME   Expanded List   Serving List(NEW)   Check-In List   Reload Page   GO TO SEARCH

Service Visit list for Monday 08-18-2014 , Food Pantry

Service Visit #	Name	Address	City	County	Kids, Adults, Total	Reservation Status	Time	Signed		Notes
803891	Adams, John	123 Dawn St. (88701)	Mos Eisley	Barrymore	2 + 3 = 5	Reserved	01:00 PM			i
803917	Barber, Bill	133 Cranwood Ave (88702)	Cabot Cove	Empire	0 + 1 = 1	Served	02:00 PM	Signed Paper	New Family	
803888	Clue, Blue	2344 Canine Road (88803)	Emerald City	Barrymore	2 + 1 = 3	Reserved	10:00 AM			
803890	Duck, Daffly	125 Main Street (88801)	Bedford Falls	Barrymore	2 + 2 = 4	Served	01:00 PM	e		i
803889	Moore, Demi	321 Mabe Ln (88802)	Bedrock	Barrymore	0 + 2 = 2	Served	12:00 PM	e	New Family	
803897	Mouse, Minnie	927 Disney Lane (88801)	Bedford Falls	Barrymore	1 + 4 = 5	Served	04:00 PM	e		i
803896	Rhodes, Dusty	1465 Blue St (88701)	Mos Eisley	Empire	1 + 4 = 5	Reserved	02:00 PM			
803892	Smith, Bannana	123 Fruit Street , Apt. 21 (88801)	Bedford Falls	Barrymore	1 + 2 = 3	Reserved	01:00 PM			
803898	Wayne, Bruce	1234 Wayne Manor Cave , Apt. 56 (88801)	Bedford Falls	Barrymore	1 + 2 = 3	Reserved	04:00 PM			i

HOME   Expanded List   Serving List(NEW)   Check-In List   Reload Page

SEARCH   ☑ Search in Primary Zone [i]   ☐ Expand the Search [i]

Start typing Last Name OR last 4 digits of Phone or Cell OR **part of Last Name, part of First Name** (comma in between, with at least 2 letters from both the Last & First names).

Name Search >> [   ]   Clear the Search   Address Search >> [   ]

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

Search For a Demo Family

➢ In the search bar, type in the last name of a famous person or celebrity and see what results come up.

➤ To search, type a client's last name in the box. Try Out:

➤ Washington, Burr, Lincoln, Mouse etc..

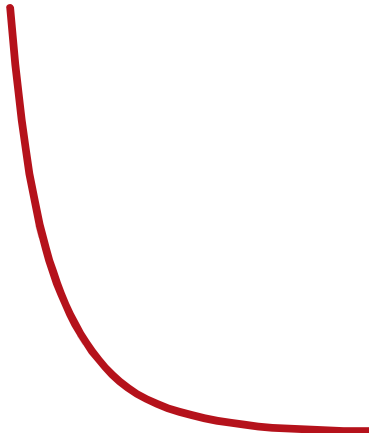**Service Visit list for Monday 08-18-2014 , Food Pantry**

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Start typing Last Name OR last 4 digits of Phone or Cell OR **part of Last Name, part of First Name** (comma in between, with at least 2 letters from both the Last & First names).

Name Search >> [   ]   Clear the Search   Address Search >> [   ]

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

Search Results

▶ After searching for a 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 the family ID number, but do not click on it

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 ℹ	1000139513	02/20/2014	11212,shaker (88802)	Bedrock	216-222-3333	☐
Barker, Izzy ℹ	1000093296	11/17/2013	301 North 5th Street (88701)	Mos Eisley		☐

After you hover over the ID, you will see:

➢ Client's name
➢ Client's address
➢ Phone number,
➢ Who is the family
➢ Past five service visits
  ➢ After hovering over, click on the Family ID to enter into the client's record

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 ℹ	1000139513					
Barker, Izzy ℹ	1000093296					
Barnes, Cliff	1000669449					
Barnes, Janie	1000109266					
Barton, Pat ℹ	1000209400					

Barker, Gerry:

11212,shaker, - Bedrock, PT 88802
Barrymore County - P: 216-222-3333 , C: none

Name	DOB	Age
Gerry Barker	01/02/1943	71
Frances Barker	10/30/1943	70
Mack Barker	04/10/1999	15
Shawn Barker	07/11/1998	15

Date	Status	Service Type
02/20/2014	Served	Pantry - Choice - 4 day
10/29/2013	Reserved	Pantry - Choice - 4 day
07/24/2013	Reserved	Pantry - Choice - 4 day
07/24/2013	Reserved	Pantry - Choice - 4 day

Checking In a Family in the Demo System

- After bringing up a client, you can see their name, address, phone number, and information about the members of the household.

- If there any inaccuracies, changes can be made on this screen.

  - For example is Mr. Brown lived at 997 and not 998, you could click on the address box to make the necessary changes.

- If no changes are needed, click on the "E-Signature" Tab

E-Signature

▶ On this screen the client is self-certifying that they are eligible to receive assistance.

▶ The top box includes all the information that is on the previous screen except for the detailed information about household members.

▶ In the top right corner is the gross income limit, stating that the household should be earning less than the amount shown in order to receive services.

▶ To Sign the Form:

  ▶ The volunteer, then clicks in the initials box and then has the client type their initials. (Note: In a real pantry environment, the volunteer will not type the client's initials in the box, they must type their own)

  ▶ Volunteer then hits the TAB key.

  ▶ The Client then hits "enter" key on your keyboard.

Main	✎ E-Signature	Served Last on: 07/31/2014	Additional Info	Notes	Family Members	System In

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

GROSS INCOME LIMITS FOR HOUSEHOLD OF 4

Name Brown, Charlie	Yearly - $47,699
Address 998 Peanut Dr, Apt. 33,	Monthly - $3,974
City Bedford Falls Zip 88801 Phone 303-656-8123	Weekly - $917

Number of people in household by age: age 60+ _2_   age 18 - 59 _1_   age birth - 17 _1_   Total _4_

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.
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, 08-07-2014, 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
Brown, Charlie	08-07-2014	I Agree	Head of Household ▾

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.

Completed E-Signature

➢ After signing, you will return to this screen and you will see the following changes:

  ➢ Signed Electronic Form is highlighted

  ➢ Record is marked as served and will contribute data towards your monthly report

  ➢ Service date and time will be updated to current date and time.

➢ Congratulations! You are done serving this family. Go ahead and click "close window" to practice serving another family.

➢ After practicing serving families already in the system, go to next slide to learn about adding a new family.

No Results and Add New Family

- In the real system, sometimes when you search, the family you are looking for will not be there.

- If you can't find them, then you'll add them to the system. To do this, click on Add New Family and Reservation

Add New Client

- To add a new client, enter the following:

  - First and last name of head of household (including the middle name is preferred but optional).

  - Address –Street address of the family, and if there is an Apartment or Lot enter that in the second box.

  - Zip code. If necessary, select the proper county.(In the demo system, please only use 88801, 88802,88803,88701, and 88702 for your zip codes).

  - Phone number(if client has no phone, enter "None").

  - Date of Birth (format must be: mm/dd/yyy i.e 09/20/1992)

  - Gender

  - Total # in each age group of the family. Include the head of household in the proper category. (Don't leave any age group blank, enter a zero if there are no family members in that age group.)

- Click next

HOME

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

Head of Household (HH)	Last-	First-	Middle-
Address Line(s)	(Street address) / (Apt #, Lot #, etc.)		
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-	Cell-	
Personal Information (HH)	Date of Birth mm/dd/yyyy **OR** Age -	DONT KNOW? Use a Placeholder of ☐ 25 ☐ 40 ☐ 65	
	Gender: ○ F ○ M ○ Not Specified or Listed		
Total # in household by Age Group:	age 60+ Seniors	age 18 - 59 Adults	age birth - 17 Kids	(including Head of Household

NEXT

Reset   **✕ Close Window & Don't ADD new record**

Add New Client

- ▶ Enter the names and birthdays of other members of the family.

- ▶ Click add and return to slide for 8 further instructions

Additional/Supporting Boxes

1. Family Notes - If client has an food allergy or special need, you can record it in this box.

2. Proxy- if a client designates a proxy, the name can be saved in this box. If you have more questions about proxies, contact your Foodbank for assistance.

3. Service box-to capture a different service from your default service, click on service box, and then choose the appropriate service.

4. Status Box- This box will let you inactivate or activate family members. So if a person leaves the household you Inactivate them or if a person reenters the household you activate them.

5. To add new family members click on family members tab

Wrap-Up

▶ Feel free to practice or continue training in the PantryTrak Demo with the username and password supplied during your training.

▶ For more information, to schedule a training, or for help getting started with PantryTrak, contact:

   ▶ Erinn Garrison (egarrison@midohiofoodbank.org - or - 614.317.9406)

   ▶ Bill Nance (bnance@midohiofoodbank.org - or - 614-274-7770)

   ▶ Tammy Tucker (ttucker@midohiofoodbank.org - or - 614-317-9426)

   ▶ General Inquires (pantrytrak@midohiofoodbank.org - or - 614.317.9479)

   ▶ David Pickering (dpickering@midohiofoodbank.org -or- 614.317.9479)