

# The Nuts & Bolts



PantryTrak Training

**PANTRYTRAK**

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## Index Vocabulary

Feel free to click on any of the subjects in this document to quickly jump there!

# PantryTrak 101

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The Basics

# Primer

Before jumping feet first into PantryTrak training, let's get a couple things out of the way.

- **No Install** – it can be accessed anywhere there is a computer and internet connection at the url:

<https://pantrytrak.com>

- **Flow** – most of the time, order of actions will be to move across the screen, right to left and then down the page
- **Use** – While there are a plethora of things PantryTrak is capable of, most users will be on the system for 3 reasons:

Search ■ Sign ■ Serve

- **Links** – occasionally there will be links to better explain some functionality, you should notice them as the text will be blue and they will be underlined. Some will take you to a certain place in the document, while others will show you an article in the PT Help Desk. To reach the help desk articles, you will need to be logged into PantryTrak.

# Tech Prep General

What you need	What you don't need
Computer! Internet!	A large data plan! PantryTrak is very lean on bandwidth <ul style="list-style-type: none"><li>• 1 Month of PantryTrak, typically uses less data than a movie on Netflix</li><li>• 1 Hour of PantryTrak, less than 5 min YouTube video</li></ul>



**PANTRY  
TRAK**



**You Tube**  
**NETFLIX**

# Tech Prep Specifics

## Internet

- A WiFi network in a building nearby. An access point may need to be installed to extend the reach of your network to your distribution site. The PantryTrak team can help you with that!
- A hotspot! Smart phones can be used as a hotspot.

## Computers

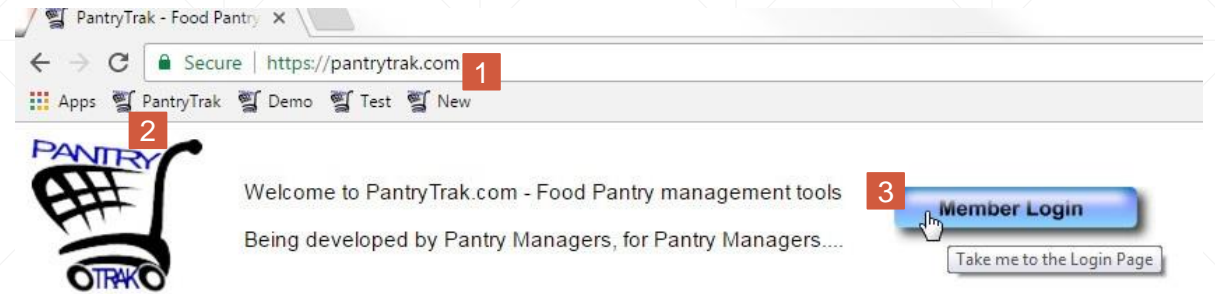
- The number of computers you need depends on how many clients you serve per distribution. The average is 2-3 of any of the devices listed below:
- Laptops
  - Windows XP or newer, Mac 2008 or newer, HP Chromebooks (Google/Chrome OS)
- Tablets
  - iPad, Amazon Fire, Android Device

# Navigation Website

1. Navigate to the website by typing the URL.

<https://pantrytrak.com>

1. Or if it's already bookmarked..
2. Click the Member Login button!



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

**Privacy Policy:**

The privacy of Client Data is important to us and we want Clients, Agencies, and Food Banks to know how data is collected, used, shared, and managed.

Please review our Privacy Policy here: [CLICK HERE to view the Privacy Policy](#)

*PantryTrak is being developed and supported through the leadership of Mid-Ohio Foodbank, for more information please contact our team at [pantrytrak@midohiofoodbank.org](mailto:pantrytrak@midohiofoodbank.org), or call 614-317-9450.*



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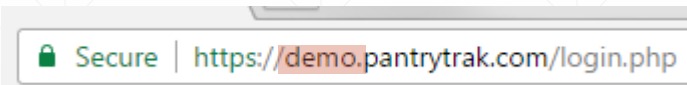
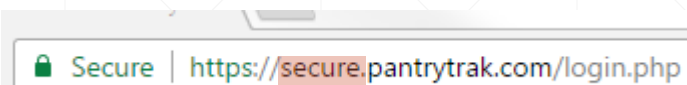


# PANTRYTRAK

# Navigation Login

1. The next screen will prompt for a username and password and click login.\*
2. If you are training right now, you should be using the demo system. Please click the link to do so.  
[demo.pantrytrak.com](https://demo.pantrytrak.com)

FYI You can easily identify which site you are trying to access by looking at the URL.



\*If you do not have a username or password please contact your food bank for assistance. These credentials only work for the demo system!



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  1

Password

LOGIN

For users with authorized access to the Demo system, please use the following link - [demo.pantrytrak.com](https://demo.pantrytrak.com) 2

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 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.

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



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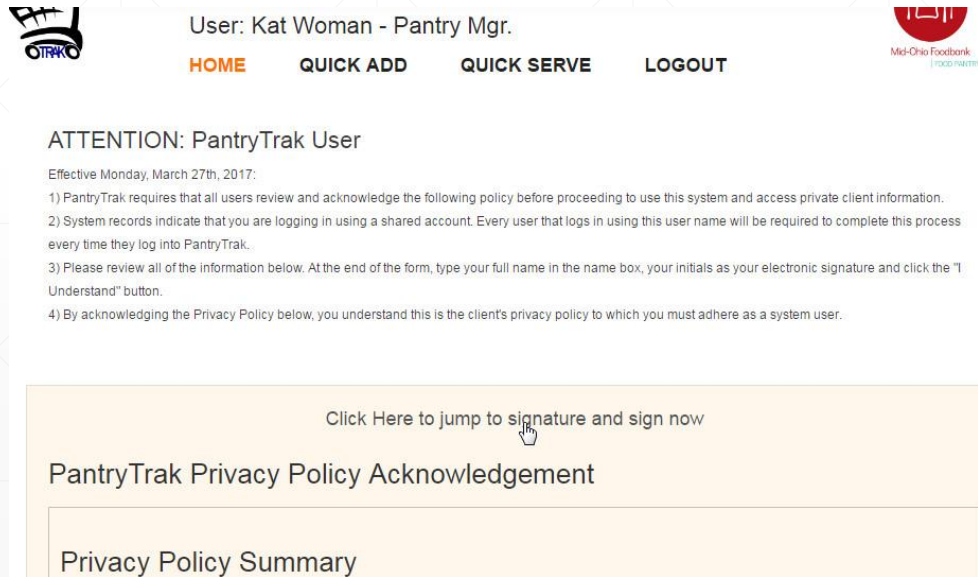


# Navigation Privacy Policy

The first time you login to PantryTrak you will need to sign the Privacy Policy. Depending on your role at an agency, you may need to sign every time you login. Doing so, is very simple.

1. Feel free to read the policy, or click jump to signature

2. Type your name, type your initials
3. Click I Understand



User: Kat Woman - Pantry Mgr.

HOME QUICK ADD QUICK SERVE LOGOUT

Mid-Ohio Foodbank FOOD PANTRY

**ATTENTION: PantryTrak User**

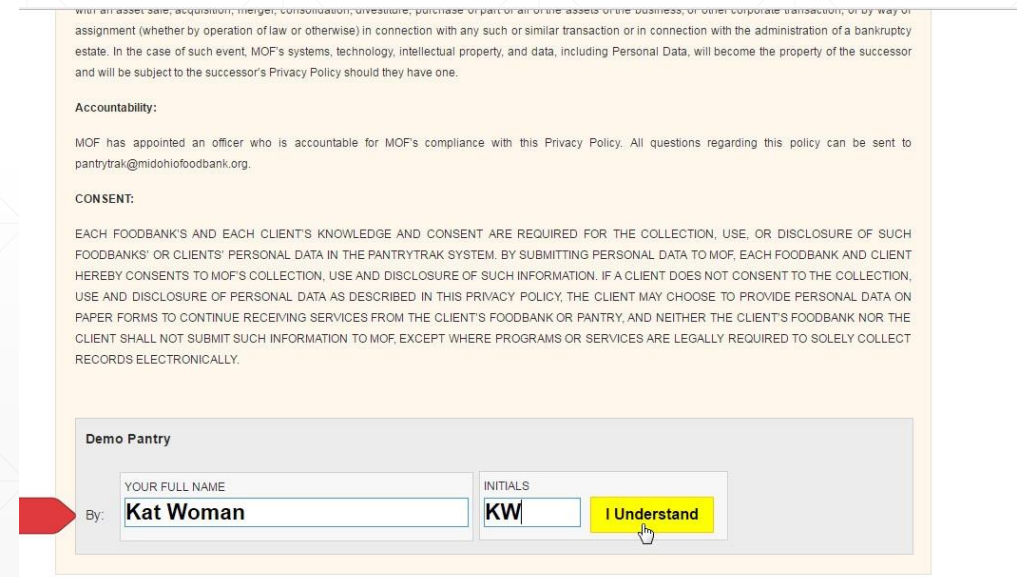
Effective Monday, March 27th, 2017:

- 1) PantryTrak requires that all users review and acknowledge the following policy before proceeding to use this system and access private client information.
- 2) System records indicate that you are logging in using a shared account. Every user that logs in using this user name will be required to complete this process every time they log into PantryTrak.
- 3) Please review all of the information below. At the end of the form, type your full name in the name box, your initials as your electronic signature and click the "I Understand" button.
- 4) By acknowledging the Privacy Policy below, you understand this is the client's privacy policy to which you must adhere as a system user.

Click Here to jump to signature and sign now

PantryTrak Privacy Policy Acknowledgement

Privacy Policy Summary



with an asset sale, acquisition, merger, consolidation, restructure, purchase or part or all of the assets or the business, or other corporate transactions, or by way of assignment (whether by operation of law or otherwise) in connection with any such or similar transaction or in connection with the administration of a bankruptcy estate. In the case of such event, MOF's systems, technology, intellectual property, and data, including Personal Data, will become the property of the successor and will be subject to the successor's Privacy Policy should they have one.

**Accountability:**

MOF has appointed an officer who is accountable for MOF's compliance with this Privacy Policy. All questions regarding this policy can be sent to [pantrytrak@midohiofoodbank.org](mailto:pantrytrak@midohiofoodbank.org).

**CONSENT:**

EACH FOODBANK'S AND EACH CLIENT'S KNOWLEDGE AND CONSENT ARE REQUIRED FOR THE COLLECTION, USE, OR DISCLOSURE OF SUCH FOODBANKS' OR CLIENTS' PERSONAL DATA IN THE PANTRYTRAK SYSTEM. BY SUBMITTING PERSONAL DATA TO MOF, EACH FOODBANK AND CLIENT HEREBY CONSENTS TO MOF'S COLLECTION, USE AND DISCLOSURE OF SUCH INFORMATION. IF A CLIENT DOES NOT CONSENT TO THE COLLECTION, USE AND DISCLOSURE OF PERSONAL DATA AS DESCRIBED IN THIS PRIVACY POLICY, THE CLIENT MAY CHOOSE TO PROVIDE PERSONAL DATA ON PAPER FORMS TO CONTINUE RECEIVING SERVICES FROM THE CLIENT'S FOODBANK OR PANTRY, AND NEITHER THE CLIENT'S FOODBANK NOR THE CLIENT SHALL NOT SUBMIT SUCH INFORMATION TO MOF, EXCEPT WHERE PROGRAMS OR SERVICES ARE LEGALLY REQUIRED TO SOLELY COLLECT RECORDS ELECTRONICALLY.

Demo Pantry

YOUR FULL NAME:  INITIALS:

By:

# Home Screen Overview

When you first login, there are a number of places you can go from the Main Menu. But let's start with the aforementioned

Search ■ Sign ■ Serve

To get there we'll first choose our [Event](#), Food Pantry.

Main Menu	
Gift Adoption Tools	Adoption List (Kid/Gift view) Adoption List (Kid/Gift/Donor view) Adoption Families (summary counts) ERROR Check - Families with multiple Reseravtions Tools Menu Status Counts <b>**NEW**</b>
Manager Tools	Manage Alt ID Types eSignature Audit Create Reservations from Prior Services (Offline Service)
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 Analysis & Learning Center Main Pantry Report Include Produce
PRIVACY POLICY	Privacy Policy Privacy Policy Posting (recommended)
HELP DESK	Help Desk & Knowledge Base (ask for Help and find Answers about PantryTrak) PT Help Desk

**\*\*\* 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.

# Search Search

After clicking your Event, we'll start to search for *Teddy Roosevelt*.

1. First by clicking the search box, then by typing **roo,t**. We do this because families are first found by the last name, and then narrowed by first name.
2. It turns out that there are two Teddy Roosevelt's in the system (more on that later), but the one we're looking for resides at 20 Sagamore Hill.
3. Once we have decided on the family, click on their name to move forward.

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

1 ROO,T Found 3 matches - Hover over the info icon to see more information, Clicking the link will add the visit immediately. [RESET](#)  Expand

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
3 Families that You Have Served							
<a href="#">Rooker, Tim</a>		2010 Sixth Ave	Bedford Falls, PT	88801		740-111-3859	<input type="checkbox"/>
<a href="#">Roosevelt, Teddy</a>		1600 Pennsylvania Avenue Apt. 31	Mos Eisley, PT	88701	12/15/2016	614-664-1944	<input type="checkbox"/>
<a href="#">Roosevelt, Theodore</a>		20 SAGAMORE HILL RD 2	Bedford Falls, PT	88801	04/18/2017	555-111-0000	<input type="checkbox"/>

3 [Add New Family & Visit](#)

Service Visit list for Tuesday 05/02/2017 . Food Pantry

# Search Update Info

Before signing, we'll just double check the family details.

1. Starting with address.
2. Then to family size and breakdown.
3. Further details, DOB, gender and active/inactive can be updated here.

Finally, click the tab at the top of the page for the Electronic Signature.

Main
E-Signature
Served Last on: 04/18/2017
Additional Info
Notes
Family Members
Referrals
Close Window
Reload

**1** **Roosevelt, Theodore J**

Last: Roosevelt | First: Theodore | Middle: J | Suffix: ▼

Homeless

Address 1: 20 SAGAMORE HILL RD | Address 2: Apt#, Lot#, etc

Zip Code: 88801 | City: Bedford Falls | State: PT | County: Barrymore County

OPTIONAL Address Verified: No  Yes  | Date: 04/25/2016

Main Phone: 555-111-0000 | 2nd Phone:  

No Phone Number

Family Size	4	Children	0	Adults	3	Seniors	1
-------------	---	----------	---	--------	---	---------	---

Family Notes

Alice is allergic to Kale.

Proxy: Calvin Coolidge

Service Provided	Add Secondary Service	Date & Time	Optional Reporting		Reporting Event
Pantry - Choice - 3 day ▼		05/02/2017 at 10:00 AM ▼	(Show)		Food Pantry ▼

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Disabled	Gender	Identification	Status
Theodore	J	Roosevelt		10/27/1958	57	Please Choose ▼	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	
Kermit	<b>3</b>	Roosevelt		01/01/1950	66	Please Choose ▼	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Alice		Roosevelt		10/31/1961	54	Please Choose ▼	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Edith		Roosevelt		08/06/1961	54	Please Choose ▼	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive

# Sign/Serve Electronic Signature

Sign & Serve happen simultaneously; as the family presents their E-Sig, they are considered Served in the system. Of course, they will then be physically served by the pantry.

1. Name of the person actually signing their household position.
2. Now the keyboard is turned over to the family
  - a) But first you will click inside the initials box
  - b) Then **only the client** will input their initials
  - c) You or the client will press the Tab button
  - d) Then **the client** will press the Space Bar

Main E-Signature Served Last on: 04/18/2017 Additional Info Notes Family Members Referrals Close Window Reload

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

Name: Roosevelt, Theodore J Address: 20 SAGAMORE HILL RD, City: Bedford Falls      Zip: 88801      Phone: 555-111-0000	<b>GROSS INCOME LIMITS FOR HOUSEHOLD OF 4</b> Yearly - \$48,599 Monthly - \$4,049 Weekly - \$934
Number of people in household by age: age 60+ <u>1</u> age 18 - 59 <u>3</u> age birth - 17 <u>0</u> Total <u>4</u>	

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, 05-03-2017, 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 Roosevelt, Theodore J <span style="border: 1px solid black; padding: 2px;">1</span>	Date 05-03-2017	Initials <span style="border: 1px solid black; padding: 2px;">2</span> I <span style="border: 1px solid black; padding: 2px;">1</span> Agree	Household Position Head of Household
---	--------------------	---	---

**2**

a. Initials I Agree

b. Initials  
TR I Agree

c. Tab  
↕

d. Space

# PantryTrak 201

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Home Screen Part 1

# Home Screen Details

If you're brand new to PantryTrak, the last few slides may not have made much sense. On the other hand, if you have some experience, then hopefully it was a good refresher. Starting with the Home Screen let's walk through all of what's happening on each page.

1. Home screen link, if you are in Search, Quick Add and Quick Serve, this button will take you back to this screen.
2. Quick Add, explained [here](#).
3. Quick Serve, explained [here](#).
4. Logout, if you're done serving families and/or using PantryTrak, this will take you out of the system.
5. Headings for each group of tools, the contents of these groups will be explained here, where they will likely make more sense.

<span style="background-color: #e67e22; color: white; padding: 2px 5px;">1</span> HOME <span style="background-color: #e67e22; color: white; padding: 2px 5px; margin-left: 20px;">2</span> QUICK ADD <span style="background-color: #e67e22; color: white; padding: 2px 5px; margin-left: 20px;">3</span> QUICK SERVE <span style="background-color: #e67e22; color: white; padding: 2px 5px; margin-left: 20px;">4</span> LOGOUT	
<b>Main Menu</b>	
Gift Adoption Tools	
<span style="background-color: #e67e22; color: white; padding: 2px 5px;">5</span>	
Manager Tools	
Service History Lookup	
REPORTS	
PRIVACY POLICY	
HELP DESK	

# Search Quick Add

It's best to think of Quick Add as a 'clean' Search screen. Unlike the Regular view of the serving list, you will not see households you have served, reservations created or any other statuses. But all the rules and functionality are the same.

Regular Serving List

Quick Add

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

Search for a Family... Type abbreviated name here  
Ex. Search for George Washington by typing "was,geo" [View Help](#) RESET  Expand

**Name** **Address** **Phone** **Alternate ID**

[Add New Family & Visit](#)

**Service Visit list for Tuesday 01/17/2017, Food Pantry**

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
826576	Kent, Clark	123 Metropolis Drive	Apt. 987 Bedford Falls, PT	Barrymore	88801	1 + 2 = 3	Served	09:00 AM	e	
826577	Kent, Clark	600 Main Street	Lot 18 LAURELVILLE, OH	HOCKING	43135	0 + 4 = 4	Reserved	10:00 AM		
826578	Kent, Clark	2445 Lane Rd	JACKSON, OH	JACKSON	45640	0 + 2 = 2	Reserved	10:00 AM		
826575	Mouse, Mickey	1 BLISS	EUCLID, OH	CUYAHOGA	44123	14 + 4 = 18	Served	09:00 AM	e	
826580	Mouse, Mickey	7568CENTRAL AV	Theme Park CLEVELAND, OH	CUYAHOGA	44106	10 + 6 = 16	Served	12:00 PM	e	
826579	Mouse, SeniorIA	1234 LANE AVE	HOMELESS CLEVELAND, OH	CUYAHOGA	44115	19 + 13 = 32	Served	12:00 PM	e	

Visits - 6

Number of Visits by Time Slot  
09:00 AM - 2  
10:00 AM - 2  
12:00 PM - 2

Service Summary  
Pantry - Choice - 3 day - 4

Stats Family Size [Download CSV](#)

Demo Pantry

You are logged in as: Super Foodbanker - Pantry Mgr.

HOME QUICK ADD QUICK SERVE LOGOUT

QUICK ADD - Lookup a FAMILY and add services for Food Pantry on Tuesday January 17, 2017. (click to change event or event date)

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

**Name** **Address** **Phone** **Alternate ID**

[ADD NEW Family & Reservation](#)



# Search Quick Serve

Quick Serve was developed specifically for managing a high volume distribution where a signature is not required.

Think of it as a tool that rolls searching and serving into one quick and easy process.

However, because of the prep and equipment involved, it is best explained in [this](#) Help Desk Article.

QUICK SERVE - Scan an Alt ID to add a family to **Toys on Wednesday May 17, 2017.**  
(click to change event or event date)

Scan Alt ID...

There are 0 services events for Toys on 05/17/2017.

[Click here to view all services for Toys on 05/17/2017.](#)

# Home Screen Events

Events, events in PantryTrak are all the programs an agency maintains. It's also the first choice to be made when serving families.

1. Clicking the yellow buttons on the Home Screen will take you to Search and Serve clients for today's date.
2. Jump to day, if you're scheduling an Event in the future, or filling in past Events, this is one way to get there.
3. View recent listing of all your Events, click on a date.
4. Service history at a glance. Recent stats as well as a chart of your entire history of service you've entered into PantryTrak

**Serve Families on 05/04/2017**

**Jump to day**

Select Event: Food Pantry

Choose a Date: 05/04/2017

Submit

Food Pantry

Holiday Basket

Produce Market

CSFP Enroll

Referrals

Toys

Offline|Delivery

Mobile Pantry

## Service Log

Current

By Year

Food Pantry 
Holiday Basket 
Produce Market 
CSFP Enroll 
HN Pantry 
Referrals 
Toys 
Offline|Delivery 
Mobile Pantry 
NJ Pantry 
MI Pantry

Event	Date	# Reservations	
Food Pantry	05/10/2017	3	Check-in
Food Pantry	05/04/2017	3	Check-in
CSFP Enroll	05/04/2017	1	Check-in
Food Pantry	05/03/2017	7	Check-in
Food Pantry	05/02/2017	24	Check-in
Food Pantry	05/01/2017	6	Check-in
Mobile Pantry	05/01/2017	7	Check-in

## Service Snapshot

	Visit Records	Served
Today	4	1
This Week	48	30
This Month	52	31
This Year	3105	1202

click chart below for NEW report

Served Records in PantryTrak between January 1, 2012 and April 10, 2014

Complete History

# PantryTrak 201


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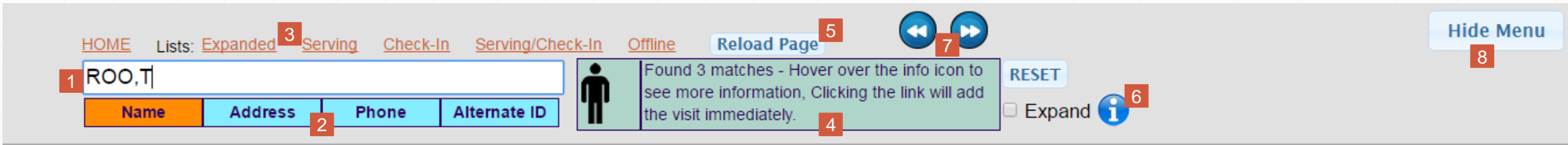


Search

**PANTRYTRAK**

# Search What is all this stuff?

1. Search box, be sure to click inside here before you start typing
2. Search types, click to change. When it's orange, that means it has been selected.
3. [Lists](#), explore different way of viewing reservations (made ahead of time) or served results.
4. Search results box, provides feedback on the type of search and number of results.
5. Since PantryTrak is lean on bandwidth, some things don't constantly update. If you've added families to the Service Visit List and don't see them, just click Reload Page.
6.  you'll see these around PantryTrak when something needs explained or displayed.
7. Navigate to your (<<) last or next (>>) date of service.
8. If you have made reservations and are just looking for names on the list you can hide all of this.



The screenshot shows the PantryTrak search interface with the following elements and callouts:

- 1**: Search input field containing "ROO,T".
- 2**: Search type tabs: "Name" (orange), "Address", "Phone", and "Alternate ID".
- 3**: "Lists" menu with sub-options: "Expanded", "Serving", "Check-In", "Serving/Check-In", and "Offline".
- 4**: Search results box showing "Found 3 matches - Hover over the info icon to see more information, Clicking the link will add the visit immediately." and an "Expand" checkbox.
- 5**: "Reload Page" button.
- 6**: Information icon (i).
- 7**: Navigation arrows (left and right).
- 8**: "Hide Menu" button.

# Search Types

There are 4 different ways to search for clients, this page summarizes the way each works. The next few pages will provide more in-depth explanations.



Name

Name search works by entering a portion of the last name, then a part of the first name. Separating the two parts by using a comma.



Address

Address search can be done using the street number or name. Both work the same way.



Phone

Phone search works by looking at the last digits of the number, rather than the first three. Because area codes will easily max out results.



Alternate ID

Alternate ID can be easily scanned or entered via the keyboard.

# Search Name

So far, we've seen a search for Teddy Roosevelt and Elsay Smith. Modeling your name search based on those examples should help you find any family. However, there is one more thing to consider when searching, how much of a difference a comma can make.

Even though it is possible to find families by just entering their last name, you should know that both the comma and a space act as a separator for the first and last name. Most of the time this is not an issue. But if you were search for *Oscar De La Cruz*, you can see where it would be a problem.

- In the first example search interprets the entered text as 2 letters of the last name, then 2 letters of the first name. Hence the results.
- But as we've now entered a comma, we can see the results have instantly changed.

The moral of the story, is that it is always best to use a comma to separate the first and last name.

de la

Name	Address	Phone	Alternate ID
------	---------	-------	--------------

Name	Info	Address
<a href="#">Decker, Laura</a>		120 W Main
<a href="#">Defazio, Laverne</a>		88 Paramount Rd

de la,

Name	Address	Phone	Alternate ID
------	---------	-------	--------------

Name	Info
<a href="#">De La Cruz, Oscar</a>	
<a href="#">De La Cruz Vega-Sanchez, Maria Elena</a>	

# Search Address


Address search can be done using the street number or name. Both work the same way.




- In the example, addresses starting or even ending with 543 will both be part of our results.
- Same with *Roll*, any street name with the word roll somewhere in it, will turn up. Even if it's part of another word.

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

543

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


 Found 25 matches. See more information. Visit immediately.



Name	Info	Address
<a href="#">Arthur, King</a>		543 Merlin Way
<a href="#">Demonstrate, Sunshine</a>		5432 Lesson Rd. 001
<a href="#">Doe, Paul</a>		6543 French Street

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

Roll

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

 Found see more the vis

Name	Info	Address
<a href="#">Carpet, Shag</a>		888 Roll Ave.
<a href="#">Erna, Sully</a>		123 Rock & Roll Way
<a href="#">Jagger, Michael</a>		100 Rolling Stones Way
<a href="#">Jett, Joan</a>		6543 Rocking Roll Way
<a href="#">Kirk, Tamara</a>		9482 Carroll Northern Rd

# Search Phone

Phone search is simple than name or address, the only trick is to at least enter the last 4 digits of a client's number. However, you may be thrown off when the digits you enter don't appear to be in the results. Remember, this search covers both Phone 1 and Phone 2. So, by clicking on the household's info, you will find that Phone 2 match your results.

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

4321

Found 22 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
------	---------	-------	--------------

Name	Info	Address	City, State	Zip	Last Served	Phone
<a href="#">Barr, Erin, VI</a>		1678 Avenue Rd Apt. 18	Bedford Falls, PT	88801	03/09/2015	123-456-7890

1678 Avenue Rd, Apt. 18  
Bedford Falls, PT 88801 - Barrymore County  
Phone 1: 123-456-7890, Phone 2: 098-765-4321

Name	DOB	Age
Erin Bob Barr	11/11/1912	102
Realname Barr		65
child1 Barr		10
Child1A Barr		10

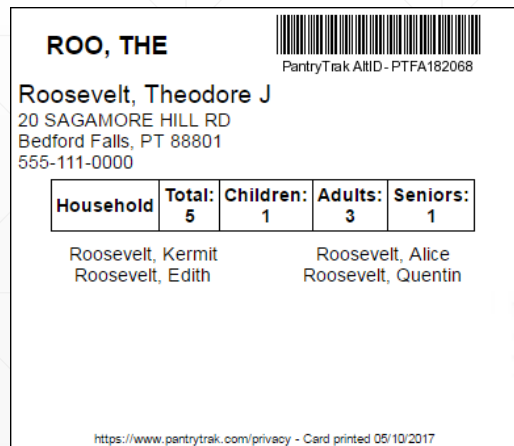
Date Time	Status	Service Type	Note
03/09/2015 01:00PM	Served	Food - Box - 1 day	
02/26/2015 10:00AM	Served	Food - Holiday Box	

<a href="#">Brown, Susie</a>		1157 Ocean Drive	Cabot Cove, PT	88702	03/22/2017		216-555-4321
------------------------------	--	------------------	----------------	-------	------------	--	--------------



# Search Alternate ID

Alternate ID is far and away the easiest of search methods, as there will only ever be one result. What's more, is that upon scanning or entering, you'll be immediately taken to the Family Service Screen. The one key thing to remember is that you must click in the search box before scanning. Set up and a more in-depth explanation of how it all works can be found in the Help Desk [here](#).



# Search How it Works

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

smi|

Name Address Phone Alternate ID

More than 150 results were returned, please narrow your search either by typing more characters, or trying a different search type.

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

smi,e|

Name Address Phone Alternate ID

Found 92 matches - Hover over the info icon to see more information, Clicking the link will add the visit immediately.

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

smi,e|

Name Address Phone Alternate ID

Found 25 matches - Hover over the info icon to see more information, Clicking the link will add the visit immediately.

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

smi,els

Name Address Phone Alternate ID

Found 2 matches - Hover over the info icon to see more information, Clicking the link will add the visit immediately.


Name	Info	Address	City, State	Zip
<a href="#">Smith, Elsie</a>	<a href="#">i</a>			
<a href="#">Smith, Elsie</a>	<a href="#">i</a>			




# Search How it Works

1. As illustrated on the previous slide, Search in PantryTrak works like a funnel. The more you type, the less results you get. But! Make no mistake, less is more.
2. Obviously, not every name will be like the example, yielding so many results. For many families, you may easily be able to find them after typing a few letters/numbers of their last name, or street address.
3. In the case of *Elsay Smith*, she is not the head of household\* we have served, but our results box tells us that we should have stopped typing when we reached *smi,elsa*. Adding a *y* to the end of our first name did not give us any more results and so really we could have stopped when we reached *smi,els*.




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





Name	Address	Phone	Alternate ID
------	---------	-------	--------------

 Your previous search, **smi,elsa**, returned no results. If a search returns no results, adding to it will not find more. [View Help](#)

\*Sometimes you may find that a person is in PantryTrak, but not listed as the HOH. This is why it's important to always search both Name and Address. But when you do serve a member over the age of 18 that is not the HOH, you can promote or make them searchable.

# Search Results

1. Families you have served and not served will be broken in two sections with those you have served always being on top.
2. Often, when searching for a household, there are many of the same names in the system. Some of these may even be duplicates. In the case of these two Roosevelt households, they at least have a different address. If they did not, a quick way to see a snapshot of the rest of the household and the service you've provided is to click the  button.
3. Not sure if you've served someone in the last 30 days? Last Served shows the date and type of service to a client.
4. Back to duplicates, when you do clearly see two of same family in the system, click Merge for both. This won't automatically combine the two, but it does start the process that will be completed by PantryTrak support.

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
1 2 Families that You Have Served							
<a href="#">Roosevelt, Teddy</a>		1600 Pennsylvania Avenue Apt. 31	Mos Eisley, PT	88701	05/03/2017 	614-664-1944	<input type="checkbox"/>
<a href="#">Roosevelt, Theodore</a>		20 SAGAMORE HILL RD	Bedford Falls, PT	88801	05/10/2017 	555-111-0000	<input type="checkbox"/> 4

20 SAGAMORE HILL RD,  
Bedford Falls, PT 88801 - Barrymore County  
Phone 1: 555-111-0000, Phone 2:

Alice is allergic to Kale.  
PROXY- Calvin Coolidge

Name	DOB	Age
Theodore J Roosevelt	10/27/1958	57
Alice Roosevelt	10/31/1961	54
Edith Roosevelt	08/06/1961	54
Kermit Roosevelt	01/01/1950	66
Quentin Roosevelt	11/07/2007	9

Date Time	Status	Service Type	Note
05/29/2017 03:00PM	Reserved	Pantry - Choice - 3 day	
05/10/2017 09:00AM	Served	Pantry - Choice - 3 day	
05/09/2017 04:00PM	Reserved	Pantry - Choice - 3 day	Teddy was in rare form today.
05/04/2017 04:00PM	Reserved	Pantry - Choice - 3 day	
05/02/2017 10:00AM	Reserved	Pantry - Choice - 3 day	
05/01/2017 12:00PM	Reserved	Pantry - Choice - 3 day	
04/18/2017 04:00PM	Reserved	Pantry - Choice - 3 day	

Plus 72 older service record(s)

# Search Lists

Expanded

- Shows more info for both reservations and logged service records.
- Helpful for bulk-updating information.

Service Visit list for 2017-05-15 , Event ID 585 - Mobile Pantry

Service Visit #	Name	Address	City	County	Count Kids, Adults, Total	Family Status	JFS Form																																					
<a href="#">830633</a>	Johnson, Batman	1939 BATCAVE CIRCLE	Emerald City	Barrymore	0 + 4 = 4	Previously Served																																						
		<table border="1"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Age</th> <th>Age Group</th> <th>Gender</th> </tr> </thead> <tbody> <tr> <td>Johnson</td> <td>Batman</td> <td>11/07/1947</td> <td>69</td> <td>65 - 84</td> <td><input type="radio"/> F <input checked="" type="radio"/> M</td> </tr> <tr> <td>JOHNSON</td> <td>ROBIN</td> <td>05/03/1950</td> <td>66</td> <td>65 - 84</td> <td><input checked="" type="radio"/> F <input type="radio"/> M</td> </tr> <tr> <td>DRAKE</td> <td>TIM</td> <td>07/22/1995</td> <td>21</td> <td>18 - 24</td> <td><input type="radio"/> F <input checked="" type="radio"/> M</td> </tr> <tr> <td>KYLE</td> <td>SELINA</td> <td>03/05/1993</td> <td>24</td> <td>18 - 24</td> <td><input type="radio"/> F <input checked="" type="radio"/> M</td> </tr> </tbody> </table>	Last Name	First Name	Date of Birth	Age	Age Group	Gender	Johnson	Batman	11/07/1947	69	65 - 84	<input type="radio"/> F <input checked="" type="radio"/> M	JOHNSON	ROBIN	05/03/1950	66	65 - 84	<input checked="" type="radio"/> F <input type="radio"/> M	DRAKE	TIM	07/22/1995	21	18 - 24	<input type="radio"/> F <input checked="" type="radio"/> M	KYLE	SELINA	03/05/1993	24	18 - 24	<input type="radio"/> F <input checked="" type="radio"/> M					Time	07:00 AM ▼						
Last Name	First Name	Date of Birth	Age	Age Group	Gender																																							
Johnson	Batman	11/07/1947	69	65 - 84	<input type="radio"/> F <input checked="" type="radio"/> M																																							
JOHNSON	ROBIN	05/03/1950	66	65 - 84	<input checked="" type="radio"/> F <input type="radio"/> M																																							
DRAKE	TIM	07/22/1995	21	18 - 24	<input type="radio"/> F <input checked="" type="radio"/> M																																							
KYLE	SELINA	03/05/1993	24	18 - 24	<input type="radio"/> F <input checked="" type="radio"/> M																																							
								Status	Reserved ▼																																			
Ages recorded for this visit -																																												
<a href="#">830567</a>	Roosevelt, Theodore	20 SAGAMORE HILL RD	Bedford Falls	Barrymore	1 + 4 = 5	Previously Served																																						
		<table border="1"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Age</th> <th>Age Group</th> <th>Gender</th> </tr> </thead> <tbody> <tr> <td>Roosevelt</td> <td>Theodore</td> <td>10/27/1958</td> <td>57</td> <td>35 - 59</td> <td><input type="radio"/> F <input checked="" type="radio"/> M</td> </tr> <tr> <td>Roosevelt</td> <td>Alice</td> <td>10/31/1961</td> <td>54</td> <td>35 - 59</td> <td><input checked="" type="radio"/> F <input type="radio"/> M</td> </tr> <tr> <td>Roosevelt</td> <td>Edith</td> <td>08/06/1961</td> <td>54</td> <td>35 - 59</td> <td><input checked="" type="radio"/> F <input type="radio"/> M</td> </tr> <tr> <td>Roosevelt</td> <td>Kermit</td> <td>01/01/1950</td> <td>66</td> <td>65 - 84</td> <td><input type="radio"/> F <input checked="" type="radio"/> M</td> </tr> <tr> <td>Roosevelt</td> <td>Quentin</td> <td>11/07/2007</td> <td>9</td> <td>5 - 17</td> <td><input type="radio"/> F <input checked="" type="radio"/> M</td> </tr> </tbody> </table>	Last Name	First Name	Date of Birth	Age	Age Group	Gender	Roosevelt	Theodore	10/27/1958	57	35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M	Roosevelt	Alice	10/31/1961	54	35 - 59	<input checked="" type="radio"/> F <input type="radio"/> M	Roosevelt	Edith	08/06/1961	54	35 - 59	<input checked="" type="radio"/> F <input type="radio"/> M	Roosevelt	Kermit	01/01/1950	66	65 - 84	<input type="radio"/> F <input checked="" type="radio"/> M	Roosevelt	Quentin	11/07/2007	9	5 - 17	<input type="radio"/> F <input checked="" type="radio"/> M					Time	11:00 AM ▼
Last Name	First Name	Date of Birth	Age	Age Group	Gender																																							
Roosevelt	Theodore	10/27/1958	57	35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M																																							
Roosevelt	Alice	10/31/1961	54	35 - 59	<input checked="" type="radio"/> F <input type="radio"/> M																																							
Roosevelt	Edith	08/06/1961	54	35 - 59	<input checked="" type="radio"/> F <input type="radio"/> M																																							
Roosevelt	Kermit	01/01/1950	66	65 - 84	<input type="radio"/> F <input checked="" type="radio"/> M																																							
Roosevelt	Quentin	11/07/2007	9	5 - 17	<input type="radio"/> F <input checked="" type="radio"/> M																																							
								Status	Served ▼																																			
Ages recorded for this visit - 9 54 54 57 66																																												

# Search Lists






**Serving**

- Helpful for communicating between areas if food distribution is happening in an area separate from registration.
- Shows both reservations and logged service records.

Reservation list for Monday 05-15-2017 , Mobile Pantry

Show  entries

Search:

Check-in Order	Update Order	Check-in Status	Name	Address (Zip Code)	City	County	Kids, Adults, Total	Service Type & Status	Time	Signed	Notes
2	<input type="text" value="2"/>	Shopping Now	<a href="#">Johnson, Batman</a>	1939 BATCAVE CIRCLE (88803)	Emerald City	Barrymore	0 + 4 = 4	Produce /Mobile Market  Reserved	06:00 AM		
1	<input type="text" value="1"/>	Received their Food	<a href="#">Roosevelt, Theodore</a>	20 SAGAMORE HILL RD (88801)	Bedford Falls	Barrymore	1 + 4 = 5	Pantry - Choice - 3 day Served 	11:00 AM		

Showing 1 to 2 of 2 entries

Previous  Next

# Search Lists

## Check-In

- Similar to serving list, but only shows families you have yet to check in
- Can be used as a more private version of your search screen because it hides service records

### Reservation list for Monday 05-15-2017 , Mobile Pantry

Show  entries

Search:

Name ▲	Address ▲	City ▲	County ▲	Count Kids, Adults, Total ▲	Reservation Status ▲	Time ▲	Notes ▲
<a href="#">Johnson, Batman</a>	1939 BATCAVE CIRCLE (88803)	Emerald City	Barrymore	0 + 4 = 4	Reserved 	06:00 AM	

Showing 1 to 1 of 1 entries

Previous  Next

# Search Lists

## Serving/Check-In

- Only shows service events that are reserved.
- Again, tracks a clients status during service.

Reservation list for Monday 05-15-2017 , Mobile Pantry

Show  entries

Search:

Check-in Order	Update Order	Check-in Status	Name	Address (Zip Code)	City	County	Kids, Adults, Total	Service Type & Status	Time	Signed	Notes
2	<input type="text" value="2"/>	<input type="text" value="Shopping Now"/>	<a href="#">Johnson, Batman</a>	1939 BATCAVE CIRCLE (88803)	Emerald City	Barrymore	0 + 4 = 4	Produce /Mobile Market  Reserved	06:00 AM		

Showing 1 to 1 of 1 entries

Previous  Next




# Search Lists

Offline

- If an agency does not have internet access during their distribution, they can create reservations ahead of time, print out the list, and use it as a paper check list.
- Can quickly change service status.

Show  entries Search:

Name ▲	Address ◄	City ◄	Count Kids, Adults, Total ◄	Service Type ◄	Reservation Status ◄	Time ◄	Notes ◄	Quick Served ◄
<a href="#">Johnson, Batman</a>	1939 BATCAVE CIRCLE (88803)	Emerald City	0 + 4 = 4		<div style="border: 1px solid black; padding: 5px;"><p>Reserved ▼</p><p><b>Reservation Status</b></p><p>Reserved</p><p>Rescheduled</p><p>Cancelled by Client</p><p>Cancelled internal</p><p>Duplicate void</p><p><b>No Show</b></p><p>Served</p></div>	06:00 AM		 Service Visit #-PTSE830633

Showing 1 to 1 of 1 entries Previous  Next

# Search Service Statistics

In the course of serving households, the list can sometimes get pretty long, pretty fast. If you're curious about the numbers for a given day, the bottom of the search page will provide that information. Before doing so, to get the most current count be sure to click the **Reload Page** button.

Additionally, if you're in charge of an agency the **Download CSV** button offers the opportunity to download the day's list, regardless of status.

The screenshot shows a dashboard with three main sections: Visits, Stats, and Service Summary.

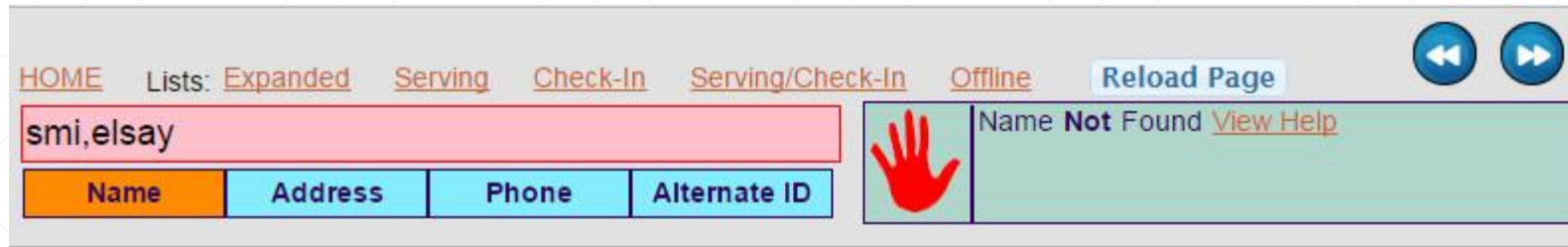
- Visits - 3**
  - Number of Visits by Time Slot: 10:00 AM - 3
- Stats**
  - Total Families Served - 1
  - NEW Families Served - 0
  - No Show - 1
  - Families without Children- 1
  - Families with Children- 0
  - Total Individuals- 3
    - Children- 0
    - Adults- 1
    - Seniors- 2
- Family Size**
  - 1-3 - 2
  - 4-6 - 1
  - 7+ - 0
- Service Summary**
  - Pantry - Choice - 3 day - 1 
  - Download CSV** button
  - [Update the Group Counts for Served records](#)
  - Show/Hide Optional Reporting Fields

# Search Add a New Household

So, what happen when we cannot find a family?

Since we couldn't find *Elsay Smith* before, we will need to add her to the system.

To start this process, just click the red text Add New Family & Visit link below the search box.



[Add New Family & Visit](#)



# Search Add a New Household

Adding a new household should be pretty intuitive, in terms of only requiring the basic information found on the Family Service Screen.

However, one thing to help prevent duplicates is that the name and address you enter will be searched against what is currently in PantryTrak. This also may be a little confusing because they work independently of one another. So, while there isn't an Elsay Smith in the system, if she lived on 1939 Batcave Circle, that is an address that PT recognizes.

In any case, if for some reason searching for a household didn't seem to work but the result offered when you try to add them appear correct, just click on the name like you normally would in search.

[HOME](#) Add a NEW Family and Service Record for TODAY, Thursday May 11, 2017 - Step 1 of 3

Head of Household (HH)	Last <input type="text" value="SMITH"/>	First <input type="text" value="ELSAY"/>	Middle <input type="text" value="Middle Name"/>	Suffix <input type="text"/>
Address Line(s)	<input type="checkbox"/> Homeless			
	Address 1 <input type="text" value="1939 BATCAVE CIRCLE"/>	Housing Type: <input type="text" value="Please Select Housing Type"/>		
	Address 2 <input type="text" value="Address 2"/>	(Apt#, Lot#, etc.)		
<input type="button" value="Clear Results"/>				

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
1 Families that You Have Served							
<a href="#">Johnson, Batman</a>		1939 BATCAVE CIRCLE	Emerald City, PT	88803	04/13/2017	555-500-6832	<input type="checkbox"/>

# Search Add a New Household

Before getting to the next step, remember that for all the fields you will need to input or check each one.

If you have missed something, like the Zip Code. The screen will prompt you and not allow you to move on.

But once you've added that piece of information, click Next!

more details

The screenshot shows a web browser window with the PantryTrak application. The main form is titled "Add a NEW Family and Service Record for TODAY, Thu". It contains several sections: "Head of Household (HH)" with fields for Last Name (SMITH) and First Name (ELSA); "Address Line(s)" with Address 1 (711 JIFFY SQ) and Address 2 (Address 2); "Zip Code (5 digits only)" with a field for Zip Code and a note about special demo system zip codes; "Phone Numbers" with Phone- (555-941-2233) and 2nd Phone- (Secondary Phone Number); "Personal Information (HH)" with Date of Birth (09/08/1977) and Gender (F); and "Total # of people in household by Age Group" with fields for # people 60+ yrs. (0), # people 18 - 59 yrs. (1), and # people birth - 17 yrs. (0). A modal dialog box is open over the Zip Code field, displaying the message "demo.pantrytrak.com says: Please enter Zip Code." with an "OK" button. A yellow "NEXT" button is visible at the bottom left of the form.

# Search Add a New Household

The next screen offers the opportunity for two more pieces of information to be input before adding the family.

1. If you have time and know the other household member details, names, DOB etc. feel free to do so here. If not, you can do so later.
2. If you're adding households to PantryTrak from TEFAP forms, you may have a number of historical visits to associate with them. This would be the spot to add those dates. If not, you can do so later.
3. Finally, when you're ready to complete your inputs, click Add!

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
Smith	Senior1		▼		Use Placeholder Age(65)? <input checked="" type="checkbox"/>	<input type="radio"/> F <input type="radio"/> M
Smith	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 and click ADD  
[Click Here to display the lines for entering service history.](#)

Add

Reset

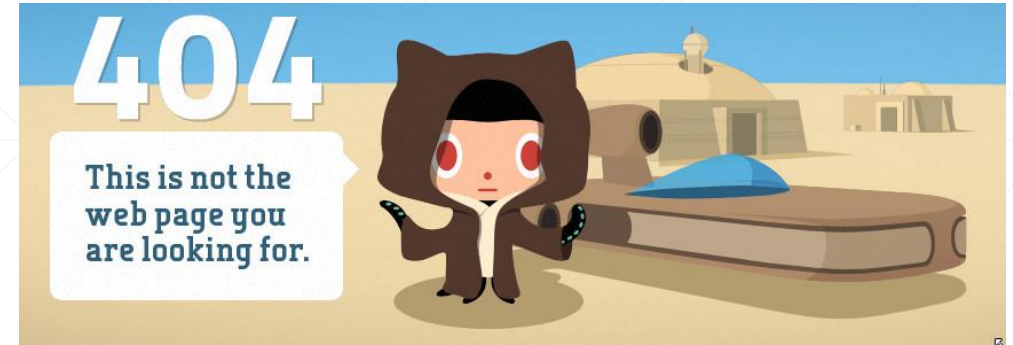
Close Window & Don't ADD new record

# Search What Happened?

If you added the household for today's date, then you'd find yourself in the next section, all about the Family Service Screen.

But! If you're adding historical records having used the [Jump to a Day](#) function under Events, then you'll end up seeing a screen similar to this.

So, you have two options. If you need to edit more information about the household or their services, click the numeric blue underlined link. If not, click the yellow Close Window button.



**Add a NEW Family and Service History Record for Monday May 1, 2017 - Step 3 of 3**

Please wait a moment while we process the information

Head of Household: Elsay Smith, Member ID 690752 was added to the database.  
Family ID 184826 was added to the database for Elsay Smith .  
additional family members ready to be added  
Family Member Senior1 Smith, Member ID 690753 was added to the database.  
Family Member Child1 Smith, Member ID 690754 was added to the database.  
Historical Service Record [830569](#) was added to the database for Elsay Smith on 05/01/2017 .

**✕ Close Window** All Done, click Close to return to prior menu OR click one of the links above to go to that Service Visit.

# PantryTrak 201

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Family Service Screen



# Main HOH Address

The name in the yellow box on the Main tab is considered the head of the household and the primary name driving search results. Two things to keep in mind when updating the information in this section.

- 1. In the first example, we've changed the Zip Code to one that exists in two different counties. Don't worry too much about picking the right county. Even if it's wrong, tools inside of PantryTrak (our Geocoder) will fix it!
- 2. When you check the box to change a household's address to Homeless you'll notice a new address is automatically entered. It should look familiar as it's the address of your agency. The reason, is that if we don't give the household an address, then we cannot give the client representation during mapping.

Mos Eisley, PT Choose County

This family is marked as homeless, please change the Housing Type on the Ad

**1 Roosevelt, Theodore**

Last	First	Middle	Suffix
Roosevelt	Theodore	Middle Nam	

Homeless

Address 1	Address 2
20 SAGAMORE HILL RD	Apt#,Lot#, etc

Zip Code	City	State	County
88701	Mos Eisley	PT	Barrymore

OPTIONAL Address Verified: No  Yes

Main Phone: 555-111-0000

No Phone Number

**2 Roosevelt, Theodore**

Last	First	Middle	Suffix
Roosevelt	Theodore	Middle Nam	

Homeless

Address 1	Address 2
123 Foodie Way	Homeless

Zip Code	City	State	County
88801	Bedford Falls	PT	Barrymore

OPTIONAL Address Verified: No  Yes  04/25/2016

Main Phone: 555-111-0000

No Phone Number

# Main Service Details

All service details can be easily changed at the point of service on the Main tab. The menu to do so is sandwiched between the address and household members.

- 1. Service Provided, the default service under the event.
- 2. Date and time defaults to todays date and hour of service.
- 3. Optional Reporting is not shown by default, click the (Show) button. You'll then be given the option to input Pieces, Pounds, Dollars and Description.
- 4. If you have changed the service provided you may also want to change where service statistic where it will accrue.
- 5. If there is more than one service provided during the course of the transaction, you can add each with the use of this button (also at the bottom of the page). Just be sure to change each accordingly under Service Provided as they will be added as the default service.

<b>1</b> Service Provided	<b>5</b> Add Secondary Service	Date & Time	<b>2</b>	Optional Reporting	Reporting Event
Pantry - Choice - 3 day		05/02/2017 at 10:00 AM		(Hide)	Food Pantry
		Pieces <b>2</b>	Pounds <b>4</b>	Dollars	Description Milk, Meat

# Main Household Members

Active and Inactive members will appear on the Main tab. If they have any other status, members can be found on the Family Members Tab. Additionally, the ability to edit First and Last name can be done there as well.

- 1. Notice, Family Size (located above the Notes box) is indicative of only members that are Active.
- 2. Disability status is not something that always is seen on the Main tab. Instead, it can be found on the Additional Info tab. However, if there is a status found on another tab that would be helpful to your organization, contact your food bank.
- 3. Active or Inactive, is an tool for easily taking members out of the household. For example, if grandparents are taking care of grandchildren for the summer, this is the way to include and remove them.
- 4. Need a to add a person to the household, click the Add Family Member! Afterward, the green box to fill in their details will appear below.

Family Size	4	Children	0	Adults	3	Seniors	1
-------------	---	----------	---	--------	---	---------	---

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	2 Disabled	Gender	Identification	Status
Theodore	J	Roosevelt		10/27/1958	57	No	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	
Kermit		Roosevelt		01/01/1950	66	Don't Know	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Alice		Roosevelt		10/31/1961	54	No	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Edith		Roosevelt		08/06/1961	54	Yes	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Quentin		Roosevelt		11/07/2007	9	Yes	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input type="radio"/> Active <input checked="" type="radio"/> Inactive

Add New Family Member here: (one at a time)

First Name	Middle	Last Name	Date of Birth mm/dd/yyyy	Age	Gender
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> F <input type="radio"/> M <input type="checkbox"/>
<input type="button" value="Add New Family Member"/>		<input type="button" value="Cancel"/>			

# Main Signature



How did they sign... or did they sign?

- When you first create a reservation, none of options will be selected.

HOW DID THEY SIGN?

Signed Paper Form	Signed Electronic Form	Not Required	Required, NOT Signed
-------------------	------------------------	--------------	----------------------

- If you're using E-Signature, it's easy. Signed Electronic Form will be automatically selected after the signature is complete.

HOW DID THEY SIGN?

Signed Paper Form	Signed Electronic Form	Not Required	Required, NOT Signed
-------------------	------------------------	--------------	----------------------

- If you're not using E-Signature, but you want to account for paper records, you'll need to click Signed Paper Form.

HOW DID THEY SIGN?

Signed Paper Form	Signed Electronic Form	Not Required	Required, NOT Signed
-------------------	------------------------	--------------	----------------------

# Main Service Visit Status

Service Visit Status is an identifier that helps you keep track of if a services was provided. When a service event is created, it always defaults to the Reserved status.

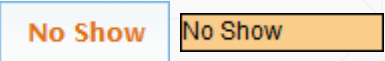


Default status when service events are created. If Reserved is highlighted this indicates either two things. It means that either the client has a reservation at your location or that you looked at their record but no service was provided.



When a family signs electronically, their status will automatically be changed to served. If the service is historical or the family signed on paper, just click this button!

If Served is highlighted, that indicates the client has been served and their service will be counted towards your monthly report. This is very important, if your numbers seem low for the clients you typically serve, you may want to look back at your service dates to be sure you see plenty of green served statuses.



No Show means that the client had a reservation but did not arrive at the site.

# Main Service Visit Status

Cancelled by Client    Cancelled by Client

Cancelled by Client is used when a client has contacted the site to cancel that reservation.

Duplicate void    Duplicate void

If you make a mistake on a reservation and it needs to be removed from your serving list you can either highlight Canceled Internal or Duplicated void and this will delete the record at a later time.

Cancelled internal    Cancelled internal




Cancelled by Client is used when a client has contacted the site to cancel that reservation.

Rescheduled    Rescheduled

If the client has reservation is made but it is rescheduled you can highlight the Rescheduled option

Search View

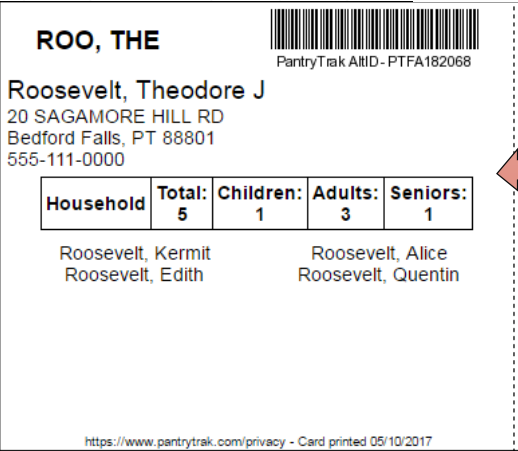
Service Visit list for Tuesday 12/20/2016 , Food Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
824787	Clause, Santa	1200 North Pole Dr. North Pole Usa	Bedford Falls, PT	Barrymore	88801	0 + 3 = 3	Served 	10:00 AM	Recheck 	
825137	Frost, Jack	111 North Pole	Bedford Falls, PT	Barrymore	88801	0 + 5 = 5	No Show	10:00 AM		
825139	Ivy, Holly	Winterberry Circle	Emerald City, PT	Barrymore	88803	0 + 1 = 1	Cancelled internal	10:00 AM		New Family
830570	Kringle, Kris	40 Snow Drive	Bedford Falls, PT	Barrymore	88801	0 + 1 = 1	Reserved 	10:00 AM		New Family
825277	Scrooge, Ebenezer	386 Penny Pincher Ave	Cabot Cove, PT	Empire	88702	0 + 1 = 1	Duplicate void	10:00 AM		New Family
825138	Snowman, Frosty	655 Winter Trail	Bedford Falls, PT	Barrymore	88801	1 + 1 = 2	Cancelled by Client	10:00 AM		
825278	Tree, Christmas	25 DECEMBER WAY	Bedford Falls, PT	Barrymore	88801	5 + 1 = 6	Rescheduled	10:00 AM		

# Main Alt ID

The full explanation of Alt ID can be found in [this](#) HESK article, but what you need to know from the Main tab is that there are two ways to setup a client with an Alt ID.

- The first and easiest is to click the Alt ID Cards notepad icon. This will open a new tab where you can print two ID cards for the family.



- The second, is a bit more involved and will require use of an existing keytag/barcode from the client that you will then attach to their PantryTrak ID. Again, this is thoroughly explained in the aforementioned article. This can be edited on the Family Members Tab as well.

Alt IDs

Close

First Name	Middle Name	Last Name	ID	Type	Status
			%0030901200013592?;6009082659022852000?	Grocery: Kroger	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Edith		Roosevelt	0030901200013592?;6009082659022852000?	Clubs/Memberships: Columbus Metropolitan Library	<input type="radio"/> Active <input checked="" type="radio"/> Inactive
Add Alt ID					

# Main Printing

Printing, I thought this is electronic?

- In the instances where PantryTrak would need to be offline, you can at least print your TEFAP form with the client's information already filled out!
- If you're definitely serving them today, you can add the date already filled in or without.



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:  
 (Household with minor children)  
 (Household without minor children)

Name: Roosevelt, Theodore  
Address: 20 SAGAMORE HILL RD,  
City: Bedford Falls, Zip: 88801, Area Code + Phone: 555-111-0000

Number of people in household by age: age 60+ 1, age 18 - 59 3, age birth - 17 0, Total 4

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	\$23,759	\$1,979	\$458
2	\$32,039	\$2,669	\$616
3	\$40,319	\$3,359	\$779
4	\$48,599	\$4,049	\$934
5	\$56,879	\$4,739	\$1,093
6	\$65,159	\$5,429	\$1,253
7	\$73,439	\$6,121	\$1,412
8	\$81,719	\$6,814	\$1,572
9	\$90,000	\$7,505	\$1,732
For each additional person add	\$8,220	\$689	\$160

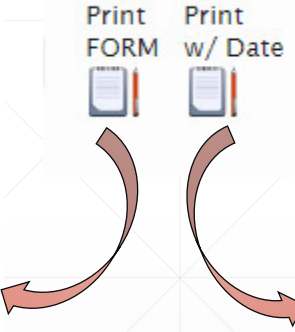
Read the following statement carefully, then sign the form & write in today's date.

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: X

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or marital or parental status in any program or activity conducted or funded by USDA. Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English. To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form (AD-3027) found online at: [http://www.usda.gov/complaint\\_filing\\_cust.html](http://www.usda.gov/complaint_filing_cust.html) and at any USDA Office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. If you cannot file a complaint form, call (866) 632-6899. Submit your completed form or letter to: USDA by (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW Washington D.C. 20250-9411; (2) fax: (202) 690-7442; or (3) email: [program.intake@usda.gov](mailto:program.intake@usda.gov). This institution is an equal opportunity provider.

This box is optional for local agency use, check one:			
Full Service	Partial Service	Signature	Date
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>



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

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For each additional person add	\$8,220	\$689	\$160

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: X 05/10/2017

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or marital or parental status in any program or activity conducted or funded by USDA. Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English. To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form (AD-3027) found online at: [http://www.usda.gov/complaint\\_filing\\_cust.html](http://www.usda.gov/complaint_filing_cust.html) and at any USDA Office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. If you cannot file a complaint form, call (866) 632-6899. Submit your completed form or letter to: USDA by (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW Washington D.C. 20250-9411; (2) fax: (202) 690-7442; or (3) email: [program.intake@usda.gov](mailto:program.intake@usda.gov). This institution is an equal opportunity provider.

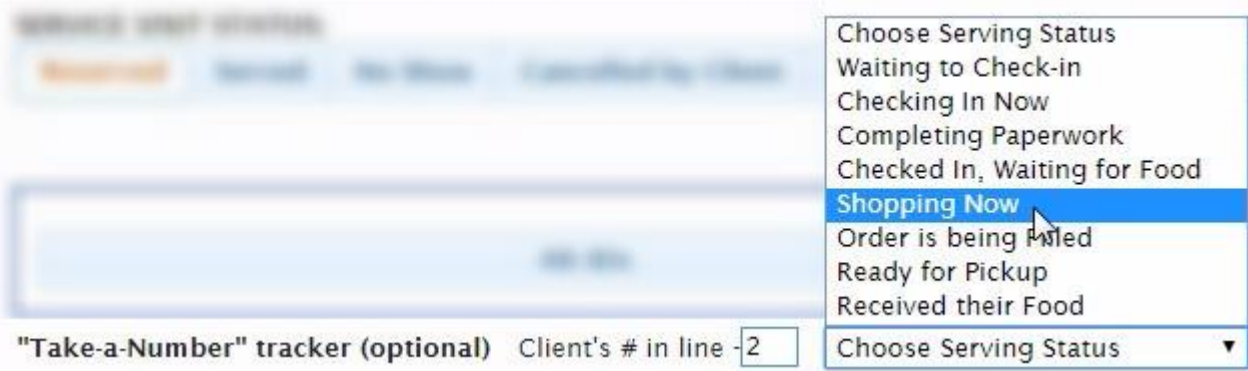
This box is optional for local agency use, check one:			
Full Service	Partial Service	Signature	Date
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
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<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u>X</u>	<u>X</u>



# Main Numbers & New Families

At the very bottom of the Main tab are two fields that will impact the lists discussed in Search and reporting.

- If you would like to issue a number to clients as they arrive or track their status, the selections can be made here and will be reflected in both the [Serving](#) and [Serving/Check In](#) lists.



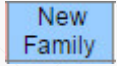
- Even though you may have served a household many times before, if the agency was not able to import data and have not input paper information, every household they serve will be a *New Family*, the first time. Even if they're not new to the system.
- If you decide to change a household to previously served, this will be reflected in reports by changing the numbers of New families.

Family Status

New Family  Previously Served

New Families	NEW Families
<a href="#">Run Report for PREVIOUSLY served families</a>	
<a href="#">Run Report for NEW families</a>	
1. Number of Households	11
2. Number of Seniors Served (age 60+)	5
3. Number of Adults Served (18 - 59)	14
4. Number of Children Served (birth - 17)	9
5. TOTAL Number of People Served (2+3+4)	28

- You can easily see which are your New families on the Search page (date dependent) as they will have a blue New Family box next to their Service Event.



# E-Signature Privacy

At the point where you're ready for a client to render their E-Signature, the client must be able to see/view the screen.

- First, they will see the Privacy Policy which they are not required to sign.

**Privacy Policy Summary**

1. Reading this Summary document is not a substitute for reading the PantryTrak Privacy Policy in full.
2. Your privacy is important to Mid-Ohio Foodbank and the foodbanks, food pantries, and other service providers that use the PantryTrak System to help process and record your requests for food, assistance, or other client services.
8. **Personal Data may be used by service providers to make referrals to other service providers, inform clients about services they may be eligible to receive, and connect clients to resources and information that may be beneficial to them.**
9. Personal Data will not be sold for direct marketing purposes.
10. The Privacy Policy may change at any time; the most current version can be found at:  
[www.pantrytrak.com/privacy](http://www.pantrytrak.com/privacy) **Click here to view it now**

(Show All Items)

- But if they would like to read more of the policy, click Show All Items, which will display the full Summary.

- If the client would like a copy emailed, type their email address and click the Email Requested button.

**Privacy Policy Summary**

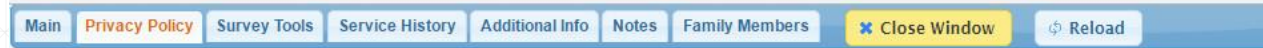
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3. Foodbanks, food pantries, and other service providers that use the PantryTrak System, have agreed to the terms of a Master Subscription Services Agreement that includes adherence to this Privacy Policy.
4. The Privacy Policy acknowledges that Personal Data is being collected in conjunction with your request for service.
5. Personal Data may include, but is not limited to:
  - a. first and last name
  - b. home address
  - c. date of birth and/or age
  - d. email address
  - e. mobile and/or home phone number
  - f. income information
  - g. employment information
  - h. family, household, and/or dependent information
6. Clients have the right to update, modify and correct errors in their Personal Data.
7. Clients have options to Opt Out of electronic data collection where permitted by Federal, State, or Local laws and/or program rules.
8. **Personal Data may be used by service providers to make referrals to other service providers, inform clients about services they may be eligible to receive, and connect clients to resources and information that may be beneficial to them.**
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10. The Privacy Policy may change at any time; the most current version can be found at:  
[www.pantrytrak.com/privacy](http://www.pantrytrak.com/privacy) **Click here to view it now**

If you would like to receive a copy of the Privacy Policy via email, please provide your email address then click "Email Requested". We will send a copy of the Privacy Policy to you via email.

Email Address:

(Show Key Items)

# E-Signature Privacy



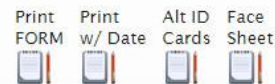
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[www.pantrytrak.com/privacy](http://www.pantrytrak.com/privacy) **Click here to view it now**

(Show All Items)

- For locations not using E-Signature, that tab will be replaced and the process is mostly the same
- However, since the client will not be seeing E-Signature form there is a reminder to show and/or advise them of it between signing and visit status. Once you have done so, just click Yes.

## HOW DID THEY SIGN?



Privacy - Please advise the client as to the Privacy Policy and where they may review it  
Have you told the client about the Privacy Policy and directed them to where they may review it? Yes

Do any members of the household have a privacy?

## SERVICE VISIT STATUS:



# E-Signature General & Household Position



Next, though we covered the E-Signature form earlier, there are a few other things to keep in mind during this part of the process.

1. If someone else besides the HOH is signing this form, please indicate that change by typing the actual Name of Person Signing.
2. Also, please be sure to change the position to Household Member or Proxy.
3. Finally, remember that only the client should ever be typing their initials. In the case of a Proxy the question is often asked if they should be typing their initials or someone else's, it's always their own initials.

Occasionally, a client may unwittingly add an extra letter to their initials, this is perfectly fine. Their digital (e)signature is no different than their written signature, as they would not change or modify the written, there is no need to do so with the electronic version.

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

Name: Roosevelt, Theodore J Address: 20 SAGAMORE HILL RD, City: Bedford Falls      Zip: 88801      Phone: 555-111-0000	<b>GROSS INCOME LIMITS FOR HOUSEHOLD OF 5</b> Yearly - \$56,879 Monthly - \$4,739 Weekly - \$1,093
Number of people in household by age: age 60+ <u>1</u> age 18 - 59 <u>3</u> age birth - 17 <u>1</u> Total <u>5</u>	
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 <u>Your Initials as Your Electronic Signature</u> 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, <u>05-15-2017</u> , 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 Roosevelt, Kermit <span style="color: red; font-weight: bold;">1</span>	Date 05-15-2017
Initials <input type="text" value=""/> <span style="color: red; font-weight: bold;">3</span>	Household Position Head of Household <span style="color: red; font-weight: bold;">2</span> Head of Household Household Member <span style="color: blue; font-weight: bold;">2</span> Proxy
<small>In accordance With Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited on the basis of race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted by USDA. Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, etc.) should contact USDA at: (202) 720-6145, (toll free) 1-877-874-6357.</small>	

# Service History

Service History, is pretty much what it sounds like, the history of services you have provided to a client, with the details of the service and family and at the time of service.

Can serve as a good way to see service events that remain unserved/Reserved.

Only place to see past Service Visit Notes.

Served Last on: 05/10/2017

Service Visit History = 80 Service Records Found

Date	Parent Service Event	Kids	Adults	Seniors	Total	Event	Service Type	Service Category	Signed?	Service Visit Status	Pounds	Pieces	Dollars	Service Description	Service Visit Note
<a href="#">05/29/2017</a>		1	4	0	5	Food Pantry		Choice Pantry							
<a href="#">05/11/2017</a>		1	4	0	5	Food Pantry		Choice Pantry		Reserved ▼					
<a href="#">05/10/2017</a>		1	4	1	6	Food Pantry		Choice Pantry	eSign						
<a href="#">05/09/2017</a>		1	4	0	5	Food Pantry		Choice Pantry		Reserved ▼					Teddy was in rare form today.

# Notes Notes

A note about... notes



- Notes on the **Main** tab also appear under the **Notes** tab

- Notes are private to your location
- Notes exist/repeat in a few places

- Service Visit Notes under the notes tab are saved under the corresponding visit under the **Served Last on:** tab

Family Notes

Alice is allergic to Kale.

**FAMILY NOTES:**  
 (These notes are only visible to users from your agency, and will be displayed any time you are serving this family.)  
 Alice is allergic to Kale.

**SERVICE VISIT NOTES:**  
 (These notes are linked specifically to this Service Visit, and are only visible to users from your agency.)  
 Teddy was in rare form today.

Date	Parent Service Event	Kids	Adults	Seniors	Total	Event	Service Type	Service Category	Signed?	Service Visit Status	Pounds	Pieces	Dollars	Service Description	Service Visit Note
05/29/2017		1	4	0	5	Food Pantry		Choice Pantry							
05/10/2017		0	3	0	3	Food Pantry		Choice Pantry							
05/09/2017		1	4	0	5	Food Pantry		Choice Pantry							Teddy was in rare form today.

# Additional Info

## Additional family level data points.

1. Change the default language of E-Signature form. Please note, the languages made available are determined by the state. In other words, if a paper copy does not exist, then it cannot be translated for PantryTrak.
2. Add/edit income details.
3. Add housing details.
4. Add disability status.
5. Add SNAP information.
6. Email!

Default Language for the Electronic Signature Form  English  Spanish  Somali **1**

Clients are **NOT** required to provide this information to receive service, however if they wish to self-report the information, you may record it on this page. This is kept confidential and only used for aggregate reporting, and is stripped of any personal data. If asked, you can explain that this type of information helps influence policy makers, donors, and others that help fight hunger.

Income Amount (Annual) - <input type="text" value="6000.00"/>	(Enter just one of the 3 fields)	Income Level <input type="text" value="\$5000 - \$9999"/>	Income Source <input type="text" value="Social Security"/>
Income Amount (Monthly) - <input type="text" value="500"/>			
Income Amount (Weekly) - <input type="text" value="115.38"/>			

Housing - What is your living situation like?

Optional Note:

Disabilities - Do you have any member of household with a disability?  
 If YES, how many people from your Household have a disability?

\*\*\* Fields for RACE & ETHNICITY have moved to the Family Members tab. Click link for SHOW ADDITIONAL INFORMATION on the Family Members tab.

How else can we help?  
Do you receive SNAP benefits?  YES  NO  
If so, how much per month?   
Interested in SNAP benefits?  YES  NO

Reason for Assistance

Email -

# Family Members Add & Promote

The Family Members Tab, is the place to edit all the details of the household.

As with the Main tab, there is an opportunity to add a single household member. Or in bulk, creating them through the multiple placeholder tool.

Add New Family Member here: (one at a time)

First Name	Middle	Last Name	Date of Birth mm/dd/yyyy	Age	Gender
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> F <input type="radio"/> M <input type="checkbox"/>

Create multiple 'Placeholder' Family Members: (enter #) Seniors(60+) -  Adults(18-59) -  Children -

If the head of household moves out, dies or simply is not the primary person coming to the agency, it may be time to consider a promotion.

- Members eligible will be those with a valid birthdate and are over the age of 18.
- To make your choice, simply click next to the members' name and click the promote button.

**Promote Head of Household**

First Name	Middle	Last Name	Age	Promote
Theodore	J	Roosevelt	57	Current
Kermit		Roosevelt	66	<input checked="" type="radio"/> Promote
Alice		Roosevelt	54	<input type="radio"/> Promote
Edith		Roosevelt	54	<input type="radio"/> Promote
Quentin		Roosevelt	9	Inactive



# Family Members Info, Status & Searchable

1. If there are edits/changes to names, that can be done here.
2. Any [Status](#) beyond Inactive is not available on the Main tab and changes must be made here.
  - Permanent Inactive, someone who is likely not returning to a household
  - Deceased, instructions for single member households where the client has died can be found [here](#).
  - Delete, if you have mistakenly created a household member
3. In the previous slide, we saw how a member can be promoted. But if you would still like to keep them actively searchable or make others easily found, this is the place to do so.
4. Deeper individual data points about each member are accessed by clicking the + sign.

+ 4 Show Additional Information fields for these Family Members

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Status	Searchable	Updated?
Theodore	J	Roosevelt	▼	10/27/1958	57	35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M	HOH		
Kermit		Roosevelt	▼	01/01/1950	66	65 - 84	<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"/> Deleted	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Alice		Roosevelt	▼	10/31/1961	54	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"/> Deleted	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Edith		Roosevelt	▼	08/06/1961	54	35 - 59	<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"/> Deleted	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Quentin		Roosevelt	▼	11/07/2007	9	5 - 17	<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"/> Deleted		

# Family Members Additional Information

Adding additional member level data points can be useful in pursuing grants, or just getting to know the population you serve a little better. Like the additional household info, none of this is a requirement (unless mandated by your service territory) and should not serve as a barrier to service.

Please keep in mind that the input fields offered have not been arbitrarily chosen by the PantryTrak team. In fact, they are what has been made available on the current US Census.


If any single one of these category are of interest, it can be moved to the Main tab. Please contact your food bank, or the PantryTrak team to make this change.

-(hide Additional information)

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Status	Searchable	Updated?
Theodore	J	Roosevelt		10/27/1958	57	35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M	HOH		
Race		White		Optional Note:						
Ethnicity		Please Choose		Optional Note:						
Immigrant or Refugee		Please Choose		Country of Birth/Origin: United States						
Military Service		Veteran		Optional Note: Served in Spanish-American War						
Education Level		College - Master's degree		Optional Note: Harvard Graduate						
Employment Status		Retired		Optional Note: Former President						
Health Insurance Status		Military - VA Health Care		Optional Note:						

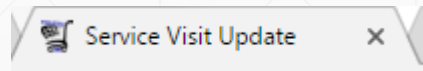
# Finish Close, Save, Reload

If you've been curious up to this point about where the save button is in PantryTrak, well... there isn't one. What you may noticed along the way, is that every time a change is made in a field, a little green dot ● appears somewhere on the screen. When you see that, your changes have been saved.

Along with saving, you also may have noticed that some changes aren't immediate. The truth is, behind scenes things have changed but will only appear to the user after clicking the  button. There aren't too many places where this is necessary, but as mentioned in the beginning, it is part of what helps keep the system so lean on bandwidth.

So, you've finished serving a client and/or updating their household information. Whether you're ready to move on to the next client or finish for the day, how do you leave the Family Service Screen? Two choices:

- Click the close window button at the top or bottom of the screen.
- Or just close the tab titled 'Service Visit Update.'



# PantryTrak 201

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Home Screen Part 2

# Service History Lookup History Lookup

Service History Lookup (to add NEW records, use the correct date from the list below, or use Quick Add) [History Lookup](#)

History Lookup offers the opportunity to view households and past services using the familiar search screen, but without creating service events when clicking on the head of household's name.

Family History - Lookup a FAMILY and Find Most Recent Service Visit

Found 2 matches - Hover over the info icon to see more information. Clicking the link will add the visit immediately.
RESET
 Expand

[ADD NEW Family & Reservation](#)

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
Roosevelt, TEDDY		1600 PENNSYLVANIA AVE	Bedford Falls, PT	88801	05/03/2017	555-111-0000	<input type="checkbox"/>
Roosevelt, Theodore		20 SAGAMORE HILL RD	Bedford Falls, PT	88801	05/16/2017	555-111-0000	<input type="checkbox"/>

### User Tips:

This QUICK FIND function is only designed to lookup Families that have already been SERVED at your pantry. It will take you to the last served record, but NOT let you create a new Reservation/Service Event for a family.

To create a new Reservation/Service Event please use [QUICK ADD](#)

# Privacy Policy Privacy Policy Posting

PRIVACY POLICY

Privacy Policy

Privacy Policy Posting (recommended)

We have a Privacy Policy because it is the right way to protect our clients and their data

Also, to set guidelines for PantryTrak users and Food Bankers to know

- What we can do with data
- What we can't do with data

Protects us, agencies, clients from inappropriate use of personal data

The policy is available in full via the link titled **Privacy Policy**.

But to help address questions, concerns as well as give clients a more leisurely opportunity to read the information, we highly recommend all agencies print and post the **Privacy Policy Posting** via the link on the Main Menu.

# Help Desk PT Help Desk

Though we've covered a lot here, there's still so much more to learn! Many of the topics covered throughout this training are explored more thoroughly under articles inside the PT Help Desk.

Additionally, if you still cannot find an answer, please submit a ticket and the PantryTrak team should respond within 24-48 hours.

The screenshot shows the PantryTrak Help Desk interface. At the top, there is a green header with the text "Help Desk". Below the header, the breadcrumb "PantryTrak > Help Desk" is visible. A search bar with the placeholder text "Search help:" and a magnifying glass icon is present. Below the search bar, there are two main action buttons: "Submit a ticket" with a plus icon and the description "Submit a new issue to a department", and "View existing ticket" with a magnifying glass icon and the description "View tickets you submitted in the past". At the bottom, there is a "Knowledgebase" section with the heading "» Top Knowledgebase articles:". Below this heading, there is a table listing articles and their view counts.

Article Title	Views
<a href="#">March 2015 Updates - Overview</a>	816
<a href="#">Search. with a comma</a>	1112

# PantryTrak 201

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Reports



# Reports Main Pantry Report



Where does all of this information go? The work you have done serving families and/or inputting paper records aggregates under reports.

To access, look under the Reports section on Main Menu.

1. Main Pantry Report, only pantry events
2. Pantry service and Produce Events

Once there, you will have two choices.

3. If you only need to most recent month's stats, just click the respective month.
4. For a more specific search of a certain date or event try the other options below.



# Reports Main Pantry Report

Regardless of the time or criteria you would like to include, you will end up with a report that looks something like this.

For most that come here, the key stats you are responsible for providing for to your food bank can be found at the top of the page in the first few boxes.

## Duplicated Vs. Unduplicated



1 family makes 4 visits

- Un-duplicated count of 1
- Duplicated count of 4

## Food Pantry - Summary of Families Served

Report created for Dates: 2017-04-01 through 2017-04-30 for Location - MOF Kroger Pantry

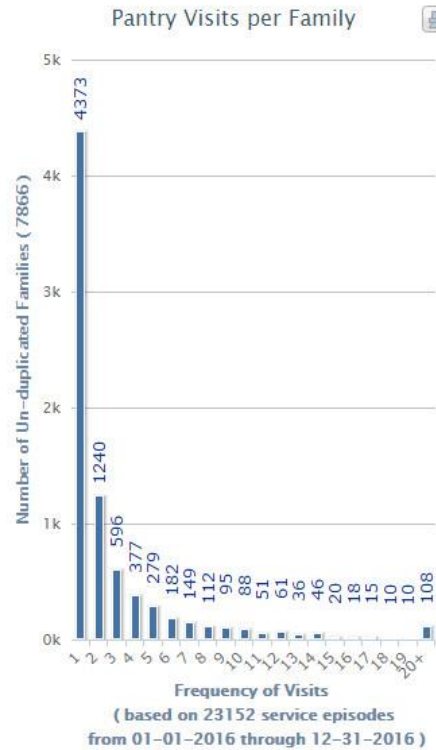
LOCAL AGENCY STATISTICAL REPORT	A With minor children	B Without minor children	C TOTALS (Column A+B)
1. Number of Households	1282	953	2235
2. Number of Seniors Served (age 60+)	223	682	905
3. Number of Adults Served (18 - 59)	2724	1160	3884
4. Number of Children Served (birth - 17)	3274	0	3274
5. TOTAL Number of People Served (2+3+4)	6221	1842	8063

Senior Citizen details	A With senior citizens	B Without senior citizens	C TOTALS (Column A+B)
1. Number of Households	700	1535	2235
2. Seniors & Children ( Grandparent Households)	20		

Family Statistics	Un-Duplicated	All Service Events
Households Served	1781	2235
People Served	6370	8063
Average Visits per Family		1.25
Average Family Size	3.58	3.61
1 - 3 Individuals in Family	942 (53%)	1179 (53%)
4 - 6 Individuals in Family	682 (38%)	851 (38%)
7+ Individuals in Family	157 (9%)	205 (9%)
<b>Age Category Totals</b>		
Kids (0 - 17 years old)	2582 (41%)	3274 (41%)
Adults (18 - 59 years old)	3108 (49%)	3884 (48%)
Seniors (60+ years old)	680 (10%)	905 (11%)
<b>Age Group Totals</b>		
0 - 4 years old	646	805
5 - 17 years old	1936	2469
18 - 24 years old	616	773
25 - 34 years old	761	956
35 - 59 years old	1731	2155
60 - 64 years old	240	321
65 - 84 years old	422	563
85+ years old	18	21

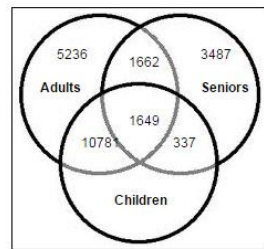
# Reports Main Pantry Report

The rest of this report covers demographics, geography, service totals and frequency distribution.



**Gender Breakdown (Un-duplicated count)**

Description	Headcount	Percentages
Female	14849	54.7 %
Male	11993	44.2 %
Not Specified	293	1.1 %
<b>Total Count</b>	<b>27135</b>	



**Total Pantry Visits - 23152**  
Chart shows the makeup of the Families served.

**Demographics - RACE**

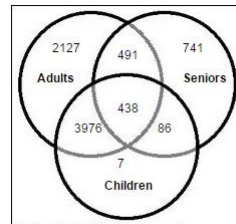
Race	Headcount
Not specified	25142
White	835
Black or African American	715
American Indian or Alaska Native	14
Asian	7
Asian Indian	2
Chinese	36
Korean	1
Other Race	42
Other Asian	22
Other Pacific Islander	1
Multi Racial - Not Specified	82
Declined to Answer	36
<b>Totals:</b>	<b>27135</b>

**Demographics - ETHNICITY**

Ethnicity	Headcount
Not specified	25947
Not of Hispanic, Latino, or Spanish origin	1113
Hispanic, Latino, or Spanish origin	10
Mexican, Mexican Am, Chicano	13
Puerto Rican origin	8
Cuban origin	5
Other Hispanic, Latino, or Spanish origin	37
Declined to Answer	2
<b>Totals:</b>	<b>27135</b>

**Demographics - MILITARY SERVICE**

Military Status	Headcount
Not specified	26345
Veteran	49
Active Duty / Reserves	5
No	732
Don't know	3
Prefer not to answer	1
<b>Totals:</b>	<b>27135</b>



Un-Duplicated Families served.

**Demographics - EDUCATION LEVEL**

Education Status	Headcount
Not specified	26821
No schooling completed	22
Elementary (Grades 1-5)	28
Middle School (Grades 6-8)	20
High School (Grades 9-12) - No Diploma	75
High School Graduate - Diploma	76
High School Graduate - GED	12
Trade school or Professional Certification	2
Some College - No Degree	42
College - Associate's degree	11
College - Bachelor's degree	12
College - Master's degree	1
Professional degree beyond a Bachelor's degree	2
Don't Know	10
Prefer not to answer	1
<b>Totals:</b>	<b>27135</b>

**Demographics - EMPLOYMENT STATUS**

Employment Status	Headcount
Not specified	26923
Employed - Full Time	34
Employed - Part Time	26
Unemployed	71
Retired	36
Student - Are in School	70
Are disabled or in poor health	58
Are a caretaker for another person	1
Other	9
Don't Know	3
Prefer not to answer	1
<b>Totals:</b>	<b>27135</b>

**Demographics - HEALTH INSURANCE STATUS**

Health Insurance Status	Headcount
Not specified	26809
Employer	16
Privately Purchased	16
Medicare	55
Medicaid	171
Military - VA Health Care	1
Other Type of Health Care Insurance	26
None	29
Don't Know	9
Prefer not to answer	1
ACA - State or Federal Marketplace	2
<b>Totals:</b>	<b>27135</b>

**Reason for Assistance**

Reason Description	Households	Headcount
Not specified	22498	76622
Working - Not making enough	54	250
Unemployed	180	601
Social Security	129	366
Reduced Social Security	9	24
Reduced Public Assistance	2	4
Working - Not making enough - Part Time	46	149
Working - Not making enough - Full Time	19	81
SNAP/Food Stamps Reduced	57	246
Utility Cut Off	42	124
Medical Bills	42	114
Other	45	128
Major Car Repair	13	30
Working - Reduced Hours	16	84
<b>Totals:</b>	<b>23152</b>	<b>78823</b>

Service Summary	Families Served	People Served	Meals Provided	Pounds Distributed	Pieces Distributed	Dollars Distributed(\$)
Pantry - Choice - 4 day	1	1	12	0.00	0.00	0.00
Pantry - Choice - 5 day	18247	61798	926970	0.00	0.00	0.00
Pantry - Choice - 6 day	1	1	18	0.00	0.00	0.00
Special - Perishables only	3448	11983	11983	0.00	0.00	0.00
Produce /Mobile Market	1	3	3	0.00	0.00	0.00
Pantry - Choice - 1day	1	10	90	0.00	0.00	0.00
Pantry - Choice - 8 day	1	3	72	0.00	0.00	0.00
Rx - Produce	1	2	2	0.00	0.00	0.00
Produce Market	1450	5016	5016	0.00	0.00	0.00
Pantry - Choice - 14 day	1	6	252	0.00	0.00	0.00
Summary of all Services	23152	78823	944418	0	0	0
<b>Key Stats</b>						
Total Types of Services Provided						11
Total Meals Provided						944418
Average Meals per Person						11.98

**COUNTIES SERVED - 25**

Zip Code	Households	Headcount	City	headcount	County Fips
43024	1	4	BELLMAWR		*Not Specified*
			STAUNTON		39049
			BLACKLICK		39049
			BUCKEYE LAKE		39035
			CENTERBURG	1	39041
			DELAWARE		39045
			DUBLIN		39047
			DUBLIN	251	39049
			DUBLIN		39053
			GRANVILLE		39061
			HEBRON		39073
			HILLIARD		39079
			HOWARD		39083
			LEWIS CENTER		39089
			MARYSVILLE		39097
			NEW ALBANY	5	39129
			NEWARK	3	39129
			HEATH		39131
			PATASKALA		

# PantryTrak 301

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Manager Tools

**PANTRYTRAK**

# Reports Analysis & Learning Center



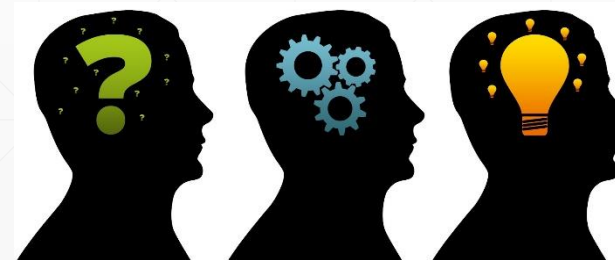
The Analysis & Learning Center is where you can access specialized reports on the service your agency does. While you can access basic reporting on your agency via the Main Pantry Report, the Analysis & Learning Center offers the opportunity to specify exactly which types of data you want to see, to include the date range in which you would like to search.

Many reports in this section started as a request for information from food banks and agencies. So, if there is piece of data you have put into PantryTrak but can't seemed to find an easy way to pull out, look for it here! And if you still can't find it, reach out to your food bank or the PantryTrak support team.

FYI, because of the ability to export all the information about the families you serve ALC reports are only available to Directors, Managers and Assistant Managers of agencies.

To access look under Reports section on Main Menu, and click **Analysis & Learning Center**

Have a question? Find an Answer!



# Reports Analysis & Learning Center

It is best to start by scrolling down the page to see what's available. However, if you have something more specific in mind, there are few ways to find what you are looking for.

1. If you already know what you're looking for, try the search box.
2. Want to see what's been recently added or sort by name? Click the triangles in the column headers

Analysis and Learning Center

## Analysis & Learning Center (ALC)

Reports and Insights into your data

A place where agencies ask questions and they are answered, learning is aggregated for all to share.

Reports Added in the last 60 days are Highlighted in Yellow

Show  entries

Search:

Report Name <span>2</span>	Description	Report Subtype	Input Fields	Date Added
<a href="#">Service Focused Dimensions and Measures</a>	A data export of dimensions and measures that can be loaded into Tableau to derive many insights.	<a href="#">Tableau Ready Data Sets</a>	Start Date, End Date	2016/10/31
<a href="#">Zip Code Summary Information</a>	A list of zip codes, duplicated counts of service, and un duplicated counts of households, individuals, and different age groups.	<a href="#">Zip Code/Mailing City</a>	Event, Start Date, End Date]	2016/01/25

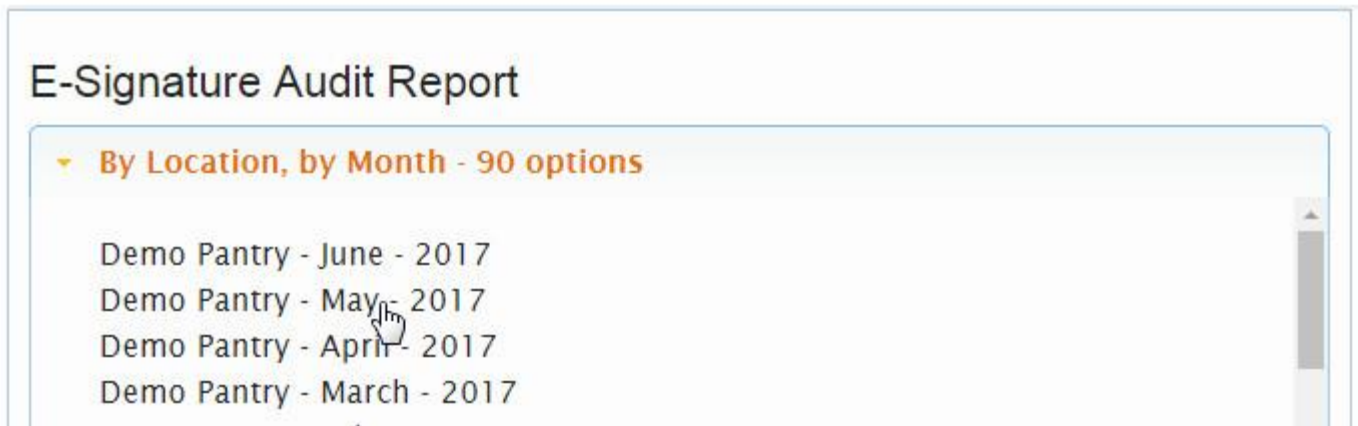
# Manager Tools E-Signature Audit



Removing the burden of paper record keeping has been the key to the growth of PantryTrak in saving agencies time while improving our ability to be compliant. While PantryTrak does not completely solve compliance issues, it does solve some of the more basic ones, while creating an audit trail to honestly and accurately represent what we have and have not recorded through the system.

To that end, PantryTrak has an e-signature audit report so that an agency manager can examine their pantry's signatures to determine if they have missed anything.

- To access, look under the Manager Tools section on Main Menu, and click **eSignature Audit Report**
- This will take you to a screen that looks similar to your reports. You can then click on the month you would like to examine. If you would like more specific options, they are below the standard by location, by month option.



# Manager Tools E-Signature Audit

- When you click on a month, it will take you to a list of services you have provided, broken into two sections: Services with e-signatures, and services without e-signatures. The example of the first section is below.



## E-Signature Audit list for 05/01/2017 through 05/31/2017 , Demo Pantry

There are 94 service records that were found for this report that have an eSignature

Date of Service	Service Visit #	Head of Household	Address City, Zip	Phone	Kids, Adults, Seniors, Total	Service Received	Form Type	Signed By	Signature Initials	Household Position	Income Limits	Signed on:
2017-05-06	<a href="#">830471</a>	88801, Elmer	32 Main St Bedford Falls 88801	937-354-6877	0 + 1 + 1 = 2	Pantry - Choice - 3 day	26	88801, Elmer Steve	SE	head of household	32039 2669 616	2017-05-06 08:41:43
2017-05-05	<a href="#">830464</a>	Allemond, Leonce	1059 Patin Street BREAUX BRIDGE 70517	337-228-2408	0 + 0 + 2 = 2	Pantry - Choice - 3 day	26	Allemond, Leonce J	LA	head of household	32039 2669 616	2017-05-05 15:08:19
2017-05-12	<a href="#">830576</a>	Berry, Betty	619 CEREAL RD Cabot Cove 88702	302-589-6188	2 + 2 + 1 = 5	CSFP	29	Berry, Betty	BBB	member of household		2017-05-12 11:11:45

- After you go through the section for services with e-signatures, you will arrive at the section for services without e-signatures. All services you provided without e-signatures will be listed here regardless of the type of service.

There are 10 service records that were found for this report that DO NOT have an eSignature

Date of Service	Reservation#	Signature Status		Kids, Adults, Seniors, Total	Service Received
2017-05-03	<a href="#">830635</a>	Signed Paper Form		++ =	Pantry - Choice - 3 day
2017-05-07	<a href="#">830477</a>	Signed Paper Form		++ =	Pantry - Choice - 3 day



# Index

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Vocabulary

**Event** | An event in PantryTrak are all the programs an agency maintains. It's also the first choice to be made when serving families.

Below shows how to identify what Event you are under on throughout the system.

Main Menu

Search

Service Event

Mobile Pantry

Service Visit list for Monday 05/15/2017 , Mobile Pantry

Reporting Event  
Mobile Pantry

**Main Menu**

- OR Adoption Tools
- Adoption List (SEARCH VIEW)
- Adoption List (SEARCH/DETAIL VIEW)
- Adoption Families (summary counts)
- ERROR Check - Families with multiple Reservations
- Tools Menu - Status Counts "MFM"
- Manage Tools
- Manage (MFT) Types
- Administrative Tools
- Details Reservations from Prior Services (Offline Services)
- Service History Lookup
- Up to 300 history records, use the correct date from the dropdown, or use Quick Apps History Lookup
- REPORTS
- Agency Status Report
- Agency & Learning Center
- Main Party Report
- Include/Exclude
- PRIVACY POLICY
- Privacy Policy
- Privacy Policy Posting (recommended)
- HELP CENTER
- Help Desk & Knowledge Base (use for help and find answers about PantryTrak) PDF Help Desk

**Special Demo System**

Please use the following zip codes for demo families:

- 08501, 08502, 08503, 08701, 08702

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

**Serve Families 05/15/2017**

Jump to day

Select Date: **Food Pantry**

Choose a Date: 05/15/2017

Submit

Buttons: Food Pantry, Holiday Basket, Produce Market, CSFP Error, Referrals, Toys, Ombuds/Delivery

Search for a Family

Search by: Name, Address, Phone, Alternate ID

Service Visit list for Monday 05/15/2017, Mobile Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
No results found.										

Number of Visits by Time Slot

State: NJ

Family Size: 4-6

Download CSV

Update App Status Counts for Recent events

Show/Hide External Reporting Fields

Page generated in 0.31968 seconds (Page revision - 20161000)

**Roosevelt, Theodore J**

Last: Roosevelt, First: Theodore, Middle: [blank], Suffix: [blank]

Address 1: 50 SACAMORE HILL RD, Address 2: [blank]

Zip Code: 08801, City: Rutherford Falls, State: NJ, County: Burlington County

OPTIONAL: Address Verified: No, Yes, No, Date: 04/25/2016

Mobile Phone: [blank], Text Phone: [blank]

Family Size: 5, Children: 1, Adults: 3, Seniors: 1

Family Notes: Alice is allergic to Kale.

Proxy: Calvin Coolidge

Reporting Event: Mobile Pantry

First Name	Middle	Last Name	Suffix	Date of Birth	Age	Disabled	Gender	Identification	Status
Theodore	J	Roosevelt		02/22/1938	27	NO	M	Identified	#Verified
Alice		Roosevelt		07/09/1930	46	NO	F	Identified	#Verified
Alice		Roosevelt		10/17/1961	54	NO	F	Identified	#Verified
Frank		Roosevelt		08/03/1961	54	YES	M	Identified	#Verified
Quentin		Roosevelt		01/07/2007	9	YES	M	Identified	#Verified

Add family member

**Service Event** | A Service Event, as you might guess, is part of an Event. Simply, it is the services provided under a particular program, or Event. In the real world, a Service Event would be the documentation associated with a visit to receive service/assistance.

In PantryTrak, Service Events are used interchangeably with the word Reservations, as every Service Event begins with the status of Reserved.

Below shows how to identify Service Events throughout the system.



**Status** | descriptor for the current state of a service event.

- Feel free to practice or continue training in PantryTrak Demo with username and password supplied during your training.
- If you have any questions about PantryTrak, feel free to contact your local Foodbank for assistance.
- Remember, don't panic if you make a mistake in PantryTrak, most things can be corrected.

## Wrap-Up

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Final Thoughts