# The Nuts & Bolts

🎓 PantryTrak Training

PANTRYTRAK

# Table of Contents

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

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# PantryTrak 101

The Basics

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# 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.

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# Tech Prep General

| What you need | What you don't need |
|---|---|
| Computer! <br> Internet! | A large data plan! PantryTrak is very lean on bandwidth <br> • 1 Month of PantryTrak, typically uses less data than a movie on Netflix <br> • 1 Hour of PantryTrak, less than 5 min YouTube video |

# 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!

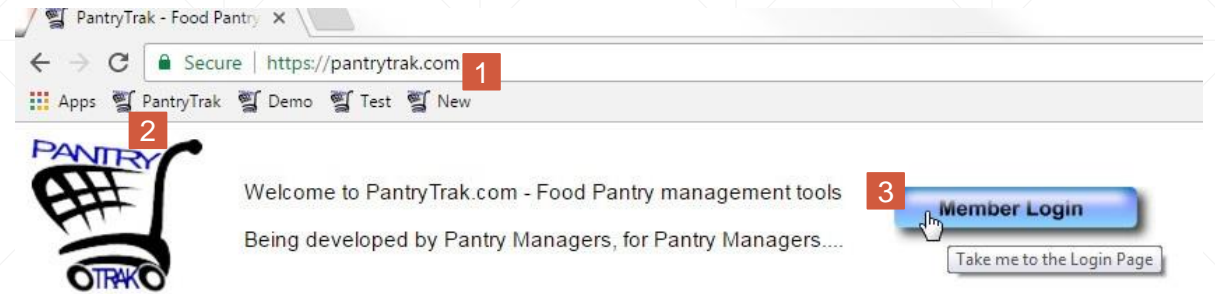- A hotspot! Smart phones can be used as a hotspot.

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

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# **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!

# 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**

FYI You can easily identify which site you are trying to access by looking at the URL.
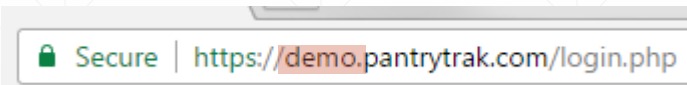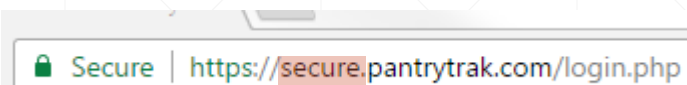
*If you do not have a username or password please contact your food bank for assistance.
These credentials only work for the demo system!



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
demo@mof   **1**

Password
moref00d!

For users with authorized access to the Demo system, please use the following link - demo.pantrytrak.com   **2**

**System Notes:**

LOGIN

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 at midohiofoodbank.org, or call 614-317-9450.*

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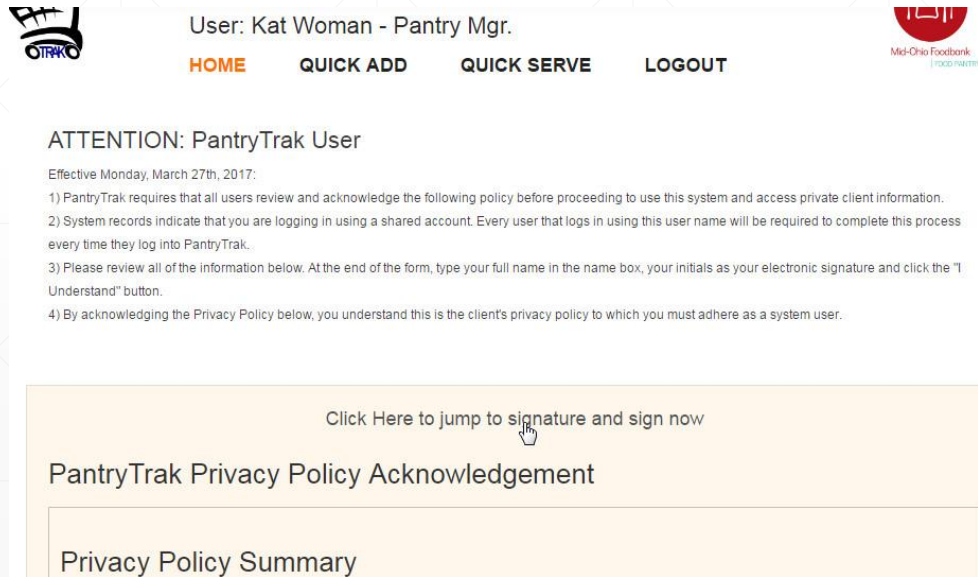
VERIFIED & SECURED
VERIFY SECURITY

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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

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# 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.

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# 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.

# 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.

# 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 <u>inside</u> 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

# PantryTrak 201

Home Screen Part 1

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# 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.

# 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**

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# 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.

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# 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**

| Food Pantry | Holiday Basket | Produce Market |
| CSFP Enroll | Referrals | Toys | Offline\|Delivery |

Mobile Pantry

**Jump to day**

Select Event: Food Pantry ▼
Choose a Date: 05/04/2017

Submit

## 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
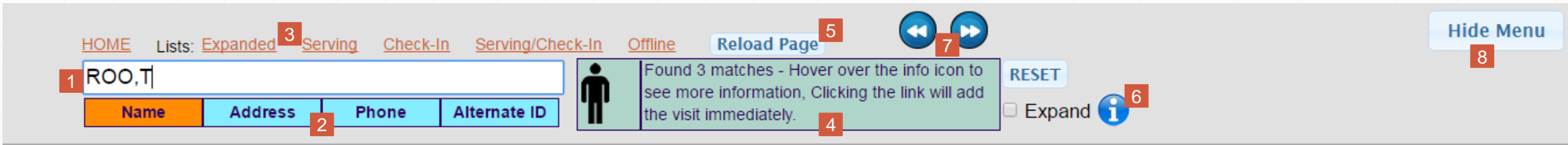
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# Search What is all this stuff?

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.

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# 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.

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# 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 <u>both the comma and a space act as a separator</u> 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 |
|---|---|---|
| Decker, Laura | ⓘ | 120 W Main |
| Defazio, Laverne | ⓘ | 88 Paramount Rd |

| de la, | | | |
|---|---|---|---|
| Name | Address | Phone | Alternate ID |

| Name | Inf |
|---|---|
| De La Cruz, Oscar | ⓘ |
| De La Cruz Vega-Sanchez, Maria Elena | ⓘ |

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# 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.

# 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

| Name | Address | Phone | Alternate ID |

Found 22 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 |
|------|------|---------|---|-------------|-----|-------------|-------|
| Barr, Erin, VI | ⓘ | 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 | |

| Brown, Susie | ⓘ | 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](#).

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# **Search** How it Works

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# 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, <u>less is more</u>.

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

smi,elsay

| 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.

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# 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 | | | 3 | | |
| Roosevelt, Teddy | ⓘ | 1600 Pennsylvania Avenue | Apt. 31 | Mos Eisley, PT | 88701 | 05/03/2017 🛒 | 614-664-1944 | ☐ |
| Roosevelt, Theodore | 2 ⓘ | 20 SAGAMORE HILL RD | | Bedford Falls, PT | 88801 | 05/10/2017 🛒 | 555-111-0000 | ☐ 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

- 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 |
|---|---|---|---|---|---|---|---|
| 830633 | Johnson, Batman | 1939 BATCAVE CIRCLE | Emerald City | Barrymore | 0 + 4 = 4 | Previously Served | |

| | | Last Name | First Name | Date of Birth | Age | Age Group | Gender | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Johnson | Batman | 11/07/1947 | 69 | 65 - 84 | ○F ●M | Time | 07:00 AM ▼ | |
| | | JOHNSON | ROBIN | 05/03/1950 | 66 | 65 - 84 | ●F ○M | | | |
| | | DRAKE | TIM | 07/22/1995 | 21 | 18 - 24 | ○F ●M | | | |
| | | KYLE | SELINA | 03/05/1993 | 24 | 18 - 24 | ●F ○M | Status | Reserved ▼ | |

Ages recorded for this visit - **i**

| Service Visit # | Name | Address | City | County | Count Kids, Adults, Total | Family Status | JFS Form |
|---|---|---|---|---|---|---|---|
| 830567 | Roosevelt, Theodore | 20 SAGAMORE HILL RD | Bedford Falls | Barrymore | 1 + 4 = 5 | Previously Served | |

| | | Last Name | First Name | Date of Birth | Age | Age Group | Gender | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Roosevelt | Theodore | 10/27/1958 | 57 | 35 - 59 | ○F ●M | Time | 11:00 AM ▼ | |
| | | Roosevelt | Alice | 10/31/1961 | 54 | 35 - 59 | ●F ○M | | | |
| | | Roosevelt | Edith | 08/06/1961 | 54 | 35 - 59 | ●F ○M | | | |
| | | Roosevelt | Kermit | 01/01/1950 | 66 | 65 - 84 | ○F ●M | | | |
| | | Roosevelt | Quentin | 11/07/2007 | 9 | 5 - 17 | ○F ●M | Status | Served ▼ | |

Ages recorded for this visit - 9|54|54|57|66 **i**

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# 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 | 2 | Shopping Now ▼ | Johnson, Batman | 1939 BATCAVE CIRCLE (88803) | Emerald City | Barrymore | 0 + 4 = 4 | Produce /Mobile Market  Reserved | 06:00 AM | | i |
| 1 | 1 | Received their Food ▼ | Roosevelt, Theodore | 20 SAGAMORE HILL RD (88801) | Bedford Falls | Barrymore | 1 + 4 = 5 | Pantry - Choice - 3 day Served | 11:00 AM | e | i |

Showing 1 to 2 of 2 entries                                              Previous   1   Next

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# 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 |
|---|---|---|---|---|---|---|---|---|
| Johnson, Batman | ▲ | 1939 BATCAVE CIRCLE   (88803) | Emerald City | Barrymore | 0 + 4 = 4 | Reserved | 06:00 AM | i |

Showing 1 to 1 of 1 entries                                     Previous  1  Next

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# 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 | 2 | Shopping Now ▼ | Johnson, Batman | 1939 BATCAVE CIRCLE (88803) | Emerald City | Barrymore | 0 + 4 = 4 | Produce /Mobile Market Reserved | 06:00 AM | | i |

Showing 1 to 1 of 1 entries                                Previous  1  Next

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# 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.

| Name ▲ | Address | City | Count Kids, Adults, Total | Service Type | Reservation Status | Time | Notes | Quick Served |
|---|---|---|---|---|---|---|---|---|
| Johnson, Batman | 1939 BATCAVE CIRCLE (88803) | Emerald City | 0 + 4 = 4 | | Reserved ▼ | 06:00 AM | i | Service Visit # - PTSE830633 |

Show ▼ entries          Search: [          ]

**Reservation Status**
Reserved
Rescheduled
Cancelled by Client
Cancelled internal
Duplicate void
No Show
Served

Showing 1 to 1 of 1 entries                Previous  1  Next

**PANTRY**TRAK

# 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.

Visits - 3

Number of Visits by Time Slot
10:00 AM - 3

Service Summary

Pantry - Choice - 3 day - 1

Stats
Total Families Served - 1
NEW Families Served - 0
No Show - 1

Family Size
1-3 - 2
4-6 - 1
7+ - 0

Download CSV

Update the Group Counts for Served records

Families without Children- 1
Families with Children- 0

Show/Hide Optional Reporting Fields

Total Individuals- 3
Children- 0
Adults- 1
Seniors- 2

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# 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.

# 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 indepently 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 the on the name like you normally would in search.

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# 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

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# 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 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!

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# 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.

# PantryTrak 201

Family Service Screen

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# **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.

# **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.

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

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# **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 |

**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 ▼ | ○F ●M | ○Needed ●Verified | |
| Kermit | | Roosevelt | | 01/01/1950 | 66 | Don't Know ▼ | ○F ●M | ○Needed ●Verified | ●Active ○Inactive |
| Alice | | Roosevelt | | 10/31/1961 | 54 | No ▼ | ●F ○M | ○Needed ●Verified | ●Active ○Inactive |
| Edith | | Roosevelt | | 08/06/1961 | 54 | Yes ▼ | ●F ○M | ○Needed ●Verified | ●Active ○Inactive |
| Quentin | | Roosevelt | | 11/07/2007 | 9 | Yes ▼ | ○F ●M | ●Needed ○Verified | ○Active ●Inactive |

**3**

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

**Add Family Member**

**4**

| First Name | Middle | Last Name | Date of Birth mm/dd/yyyy | Age | Gender |
|---|---|---|---|---|---|
| 📷 ☐ | | | | | ○F ○M ☐ |

Add New Family Member    Cancel

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PANTRYTRAK

# 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 |
|---|---|---|---|

**PANTRYTRAK**

# 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.

**SERVICE VISIT STATUS:**

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

**Reserved** | Reserved 🛒

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.

**Served** | Served 🛒

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.
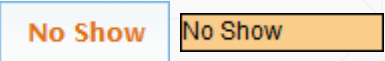
**No Show** | No Show

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

**PANTRYTRAK**

# 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 | | | |

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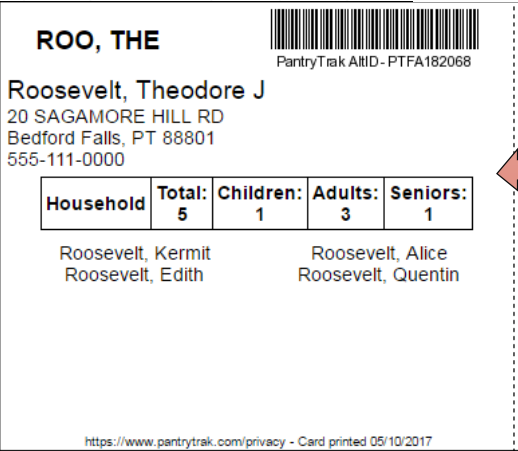
- The second, is a bit more involved and will require use of an existing keytag/barcode from the client that you will then attach to their PantryTrak ID. Again, this is thoroughly explained in the aforementioned article. This can be edited on the Family Members Tab as well.

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# 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.

# 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.
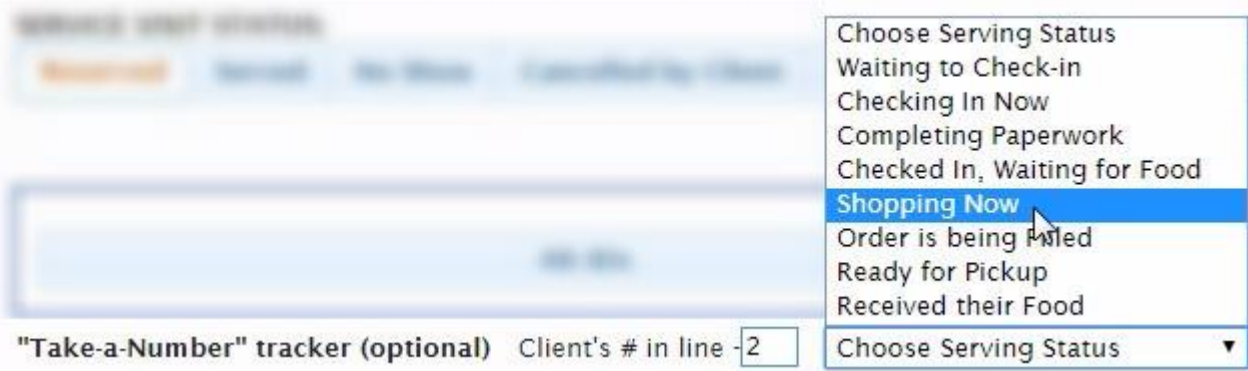
▪ Even though you may have served a household many times before, if the agency was not able to import data and have not input paper information, every household they serve will be a *New Family,* the first time. Even if they're not new to the system.

▪ If you decide to change a household to previously served, this will be reflected in reports by changing the numbers of New families.



▪ 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.

PANTRYTRAK
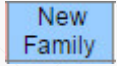
# E-Signature Privacy

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.



- 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.



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# E-Signature **Privacy**



- 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.
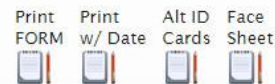
# E-Signature General & Household Position

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 <u>only the client should ever be typing their initials</u>. In the case of a Proxy the question is often asked if they should by 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.

**PANTRYTRAK**

# Service History

Service History, is pretty much what is 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 05/29/2017 | | 1 | 4 | 0 | 5 | Food Pantry | | Choice Pantry | | | | | | | |
| 05/11/2017 | | 1 | 4 | 0 | 5 | Food Pantry | | Choice Pantry | | Reserved ▾ | | | | | |
| 05/10/2017 | | 1 | 4 | 1 | 6 | Food Pantry | | Choice Pantry | eSign | | | | | | |
| 05/09/2017 | | 1 | 4 | 0 | 5 | Food Pantry | | Choice Pantry | | Reserved ▾ | | | | | Teddy was in rare form today. |

**PANTRYTRAK**

# Notes Notes

A note about… notes

- **Notes are private to your location**

- Notes exist/repeat in a few places

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

Family Notes

Alice is allergic to Kale.

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

**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. |

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# 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) - 6000.00
Income Amount (Monthly) - 500
Income Amount (Weekly) - 115.38    (Enter just one of the 3 fields) **2**

**Income Level** $5000 - $9999

**Income Source** Social Security

**Housing - What is your living situation like?**
Temporary - Unimproved Structure (Garage, Shed, Warehouse, etc...)
Optional Note: Tent. Still living in the Badlands. **3**

**Disabilities - Do you have any member of household with a disability?**
Yes    If YES, how many people from your Household have a disability? 2 **4**

*** 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? $0
Interested in SNAP benefits? ●YES ○NO **5**

**Reason for Assistance** Social Security

Email - speaksoftlycarryabigstick@gmail.com **6**

PANTRYTRAK

# 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 |
|---|---|---|---|---|---|
| ☐ | | ☐ | | | ○F ○M ☐ |

Add New Family Member   Reset

Create multiple 'Placeholder' Family Members:  (enter #)   Seniors(60+) - [0]   Adults(18-59) - [0]   Children - [0]   Create

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

Cancel

## Promote Head of Household

| First Name | Middle | Last Name | Age | Promote |
|---|---|---|---|---|
| Theodore | J | Roosevelt | 57 | Current |
| Kermit | | Roosevelt | 66 | ⦿Promote |
| Alice | | Roosevelt | 54 | ○Promote |
| Edith | | Roosevelt | 54 | ○Promote |
| Quentin | | Roosevelt | 9 | Inactive |

Promote

PANTRYTRAK

# 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 | ○F ◉M | HOH | | |
| Kermit | | Roosevelt | ▼ | 01/01/1950 | 66 | 65 - 84 | ○F ◉M | ◉Active ○Inactive ○Permanent Inactive ○Deceased ○Delete | ◉Yes ○No | |
| Alice | | Roosevelt | ▼ | 10/31/1961 | 54 | 35 - 59 | ◉F ○M | ◉Active ○Inactive ○Permanent Inactive ○Deceased ○Delete | ◉Yes ○No | |
| Edith | | Roosevelt | ▼ | 08/06/1961 | 54 | 35 - 59 | ◉F ○M | ◉Active ○Inactive ○Permanent Inactive ○Deceased ○Delete | ◉Yes ○No | |
| Quentin | | Roosevelt | ▼ | 11/07/2007 | 9 | 5 - 17 | ○F ◉M | ◉Active ○Inactive ○Permanent Inactive ○Deceased ○Delete | | |

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# Family Members Additional Information

Adding additional member level data points can be useful in pursuing grants, or just getting to the 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 | ○F ⦿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: |

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# **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 [🔄 Reload] 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. [✖ Close Window]

- Or just close the tab titled 'Service Visit Update.' [🛒 Service Visit Update ✕]

DONE!
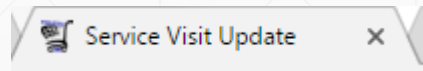
**PANTRYTRAK**

# PantryTrak 201

Home Screen Part 2

PANTRYTRAK

# **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

roo,t

| 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.

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 | ☐ |
| Roosevelt, Theodore | ⓘ | 20 SAGAMORE HILL RD | Bedford Falls, PT | 88801 | 05/16/2017 🥗 | 555-111-0000 | ☐ |

### 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

PANTRYTRAK

# **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.

**PANTRYTRAK**

# Help Desk PT Help Desk

| HELP DESK | Help Desk & Knowledge Base (ask for Help and find Answers about PantryTrak)  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.

# PantryTrak 201

Reports

PANTRYTRAK

# Reports Main Pantry Report

| REPORTS | Agency Stats Report |
|---|---|
| | Main Pantry Report [1]    Include Produce [2] |

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.

**MAIN PANTRY REPORT**
(does NOT include Produce Markets & Perishables Only distributions)

▾ **By Location, by Month - 90 options**

Demo Pantry - June - 2017
Demo Pantry - May - 2017
Demo Pantry - April - 2017 [3]
Demo Pantry - March - 2017
Demo Pantry - February - 2017
Demo Pantry - January - 2017
Demo Pantry - December - 2016
Demo Pantry - November - 2016
Demo Pantry - October - 2016

▸ **By Event, by Month - 259 options**

[4]

▸ **By Location, by Year - 17 options**

PANTRYTRAK

# **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.

## 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 | | |

Duplicated Vs. Unduplicated

1 family makes 4 visits

- Un-duplicated count of 1

- Duplicated count of 4

| 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%) |
| Age Category Totals | | |
| 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%) |
| Age Group Totals | | |
| 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 |

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# Reports Main Pantry Report

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



Pantry Visits per Family

**Demographics - RACE**

| Race | Headcount |
|---|---|
| Not specified | 25342 |
| 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 |
| Totals: | 27135 |

**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 |
| Totals: | 27135 |

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

| Description | Headcount | Percentages |
|---|---|---|
| Female | 14849 | 54.7 % |
| Male | 11993 | 44.2 % |
| Not Specified | 293 | 1.1 % |
| Total Count | 27135 | |

**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 |
| Totals: | 27135 |

**Demographics - EMPLOYMENT STATUS**

| Employment Status | Headcount |
|---|---|
| Not specified | 26825 |
| Employed - Full Time | 34 |
| Employed - Part Time | 28 |
| Unemployed | 71 |
| Retired | 35 |
| 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 |
| Totals: | 27135 |

**Demographics - HEALTH INSURANCE STATUS**

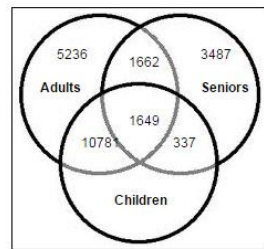| Health Insurance Status | Headcount |
|---|---|
| Not specified | 26809 |
| Employer | 16 |
| Privately Purchased | 16 |
| Medicare | 55 |
| Medicaid | 171 |
| Military - VA Health Care | 1 |
| Other Type of Health Care Insurance | 26 |
| None | 29 |
| Don't Know | 9 |
| Prefer not to answer | 1 |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

**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 |
| Totals: | 27135 |



Total Pantry Visits - 23152

Chart shows the makeup of the Families served.



Un-Duplicated Families served.

**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 |
| Totals: | 23152 | 78823 |

| 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 |

| Key Stats | |
|---|---|
| Total Types of Services Provided | 11 |
| Total Meals Provided | 944418 |
| Average Meals per Person | 11.98 |

**COUNTIES SERVED - 25**

**ZIP CODES SERVED**

| Zip Code | Households | Headcount | City | Headcount | County Fips |
|---|---|---|---|---|---|
| | | | | | *Not Specified* |
| 08031 | 1 | 1 | | | 39049 |
| | | | BELLMAWR | | 39049 |
| | | | STAUNTON | | 39049 |
| | | | BLACKLICK | | 39035 |
| | | | BUCKEYE LAKE | | 39041 |
| | | | CENTERBURG | 1 | 39045 |
| | | | DELAWARE | | 39047 |
| | | | DUBLIN | 251 | 39049 |
| | | | DUBLIN | | 39053 |
| | | | GRANVILLE | | 39061 |
| | | | HEBRON | | 39073 |
| | | | HILLIARD | 3 | 39079 |
| | | | HOWARD | | 39083 |
| | | | LEWIS CENTER | | 39089 |
| | | | MARYSVILLE | | 39097 |
| | | | NEW ALBANY | 5 | 39129 |
| | | | NEWARK | 3 | 39131 |
| | | | HEATH | | |
| | | | PATASKALA | | |

PANTRYTRAK

# PantryTrak 301

Manager Tools

**PANTRYTRAK**

# **Reports** Analysis & Learning Center

| REPORTS | Agency Stats Report |
|---------|---------------------|
|         | 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!

**PANTRYTRAK**
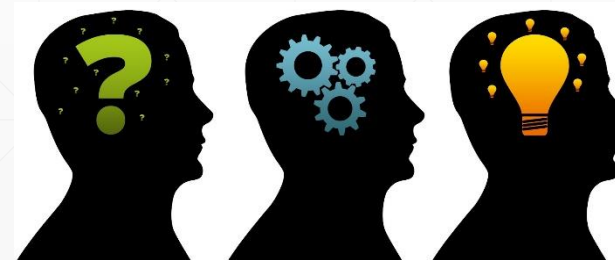
# **Reports** Analysis & Learning Center

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
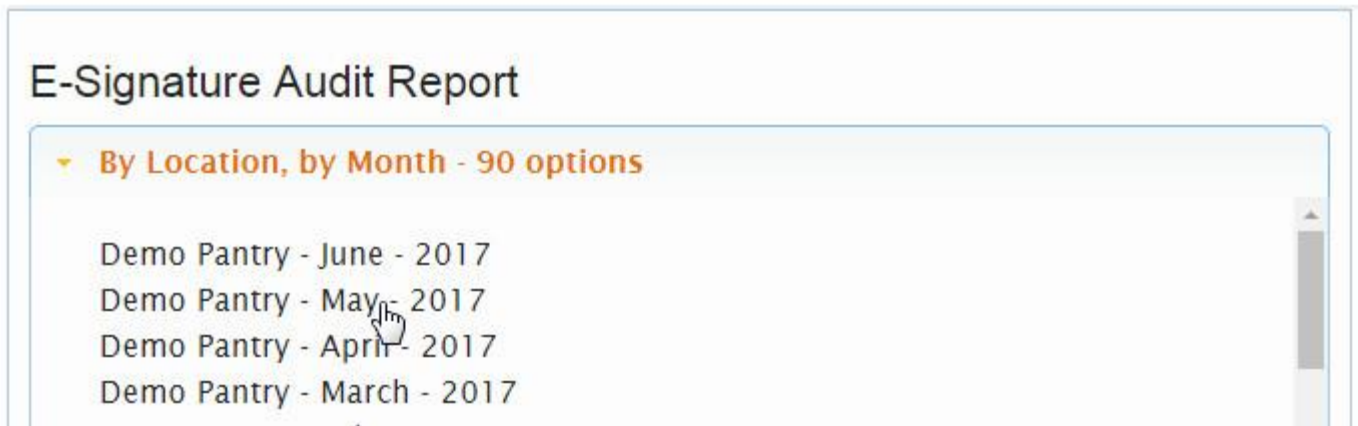
# **Manager Tools** E-Signature Audit

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.

E-Signature Audit Report

By Location, by Month - 90 options

Demo Pantry - June - 2017
Demo Pantry - May - 2017
Demo Pantry - April - 2017
Demo Pantry - March - 2017

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# 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 | 830471 | 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 | 830464 | 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 | 830576 | Berry, Betty | 619 CEREAL RD Cabot Cove 88702 | 302-589-6188 | 2 + 2 + 1 = 5 | CSFP | 29 | Berry, Betty | BBB | member of household | II | 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 | 830635 | Signed Paper Form | ● | + + = | Pantry - Choice - 3 day |
| 2017-05-07 | 830477 | Signed Paper Form | ● | + + = | Pantry - Choice - 3 day |

PANTRYTRAK

# Index

📖 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

**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.

| Main Menu | Search | Service Event |

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

PANTRYTRAK

# Wrap-Up

Final Thoughts

- 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.