



Is your guest not yielding a search?

They may be a new client. Before entering new clients into the system always search for them. We would rather update old information rather than creating a new profile for someone.

Start by clicking the red section that says “add new family & visit”

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

schwartz Name Not Found View Help RESET Expand

**Add New Family & Visit**

Service Visit list for Monday 06/26/2017 , Food Pantry

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
831035	Adams, Allen	1212 May Blvd.	Bedrock, PT	Barrymore	88802	8 + 5 = 13	Reserved	10:00 AM		
831046	Washington, George	123 CYPRESS APT 3	COLUMBUS, OH	FRANKLIN	43229	6 + 2 = 8	Served	02:00 PM	e	

Capture & Enter the required information:

HOME Add a NEW Family and Service Record for TODAY, Tuesday Dec 4, 2018 - Step 1 of 3

Head of Household (HH) Last Last Name First First Name Middle Middle Name Suffix

Homeless

Address Line(s) Address 1 Address 1 Housing Type: Please Select Housing Type  
 Address 2 Address 2 (Apt #, Lot #, etc.)

Zip Code (5 digits only) Zip Code - Enter Zip Code to lookup City, State, County  
 \*\*\* Special Demo System Note: \*\*\*  
 Please use the following zip codes for test entries - 88801, 88802, 88803, 88701, 88702.  
 Families with these special zip codes are the only ones that will show up when you use the search functions.

Phone Numbers Phone- Primary Phone Number 2nd Phone- Secondary Phone Number  
 No Phone Number

Personal Information (HH) Date of Birth OR Age - Age DONT KNOW? Use a Placeholder of  25  40  65  
 Gender:  F  M  Not Specified or Listed

Total # of people in household by Age Group: # people 60+ yrs. Seniors - # people 18 - 59 yrs. Adults # people birth - 17 yrs. Kids

NEXT

Reset Close Window & Don't ADD new record

- First & last Name
- Address // If someone is homeless check the box (this will set distribution site as default address)
- Zip Code



- Phone Number // if someone does not have a phone check the box
- DOB or use a place holder
- Gender
- Number of people in the household. You must have a place value in all 3 boxes (ex. If there are no seniors in the home please put a 0)

Once you're done entering the information click on the yellow "Next" Button to proceed.

**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" information that you have for the remaining Family Members

Last Name	First Name	Middle	Date of Birth mm/dd/yyyy	Age	Gender
Belcher	Linda		07/06/1969	44 , Age Group- 35 - 59	<input checked="" type="radio"/> F <input type="radio"/> M
Belcher	Tina		08/02/2000	13 , Age Group- 5 - 17	<input checked="" type="radio"/> F <input type="radio"/> M
Belcher	Gene		04/21/2003	10 , Age Group- 5 - 17	<input type="radio"/> F <input checked="" type="radio"/> M
Belcher	Louise		10/20/2005	8 , Age Group- 5 - 17	<input checked="" 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.](#)

Then click the yellow add button (You do not have to enter any information on this screen)

Phone Updated

**Hopkins, Brittney R**

LAST Hopkins FIRST Brittney MIDDLE R SUFFIX

Homeless

**Home Address**

STREET ADDRESS  
5510 Baumhart Rd

APT#, LOT#, ETC OR LEAVE BLANK.

CITY LORAIN STATE OH

ZIP CODE  
44052

COUNTY  
LORAIN County

Address Verified (optional): NO  YES

MAIN PHONE 440-960-2265 2ND PHONE NO PHONE NUMBER

Family Size	2	Children	1	Adults	1	Seniors	0
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Family Notes

Proxy

**SERVE THIS CUSTOMER**

In response to Covid-19, Program Staff (including Volunteers) in OHIO are permitted to complete this service WITHOUT a signature by the Customer. You simply need a verbal confirmation from the customer that their information is correct and that they meet the eligibility requirements.

Clicking this button will Sign and Serve this customer. This indicates that the customer is eligible for this service. Your name, Brittney Hopkins, will go onto the electronic signature as a member of the Program Staff.

After opening the client profile, review new information entered & income eligibility guidelines with guest. Click on the blue button that says serve this customer. Once electronic signature is captured select the yellow close window button at the top of your screen & reload your search page.