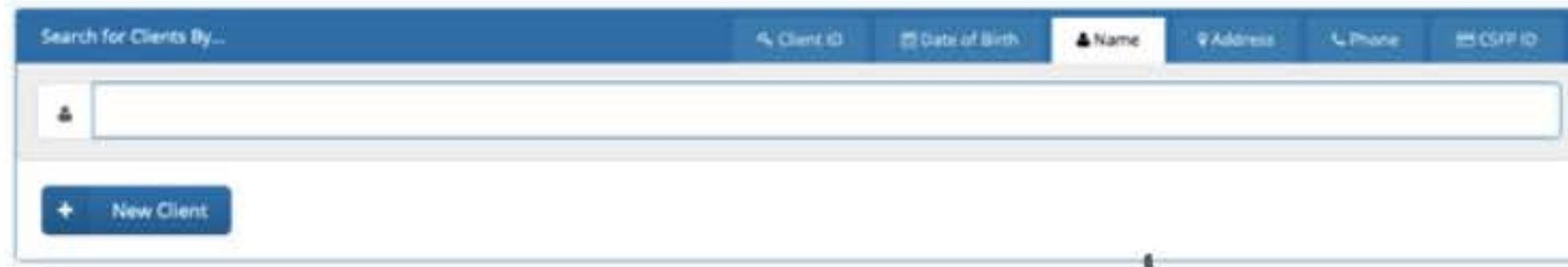


How to Record a CSFP Visit - Intake Staff

1

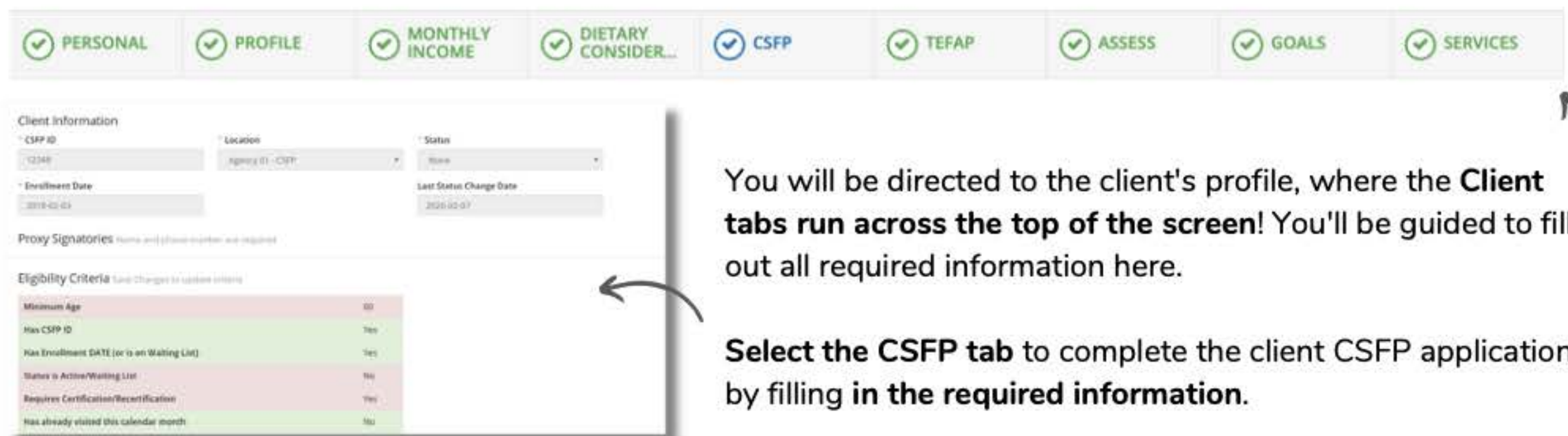


In the Dashboard, use the search bar to search for your client. You can search using the following characteristics of ANY individual within a household: First & last name, date of birth, client ID #, address or phone number.

You can also create a new client by clicking the + Add New Client button under the search bar!

+ New Client

2



Eligibility Criteria	
Minimum Age	00
Has CSFP ID	Yes
Has Enrollment DATE (or is on Waiting List)	Yes
Status is Active/Waiting List	No
Requires Certification/Recertification	Yes
Has already visited this calendar month	No

You will be directed to the client's profile, where the **Client tabs run across the top of the screen!** You'll be guided to fill out all required information here.

Select the CSFP tab to complete the client CSFP application by filling in the required information.

The client must be certified in order to record a CSFP visit.

To **certify** a client click the dark blue **Certify button** (located on the bottom of the CSFP tab); this will open up the Certify canvas with a Client eSignature disclaimer.

To **recertify** a client, click the dark blue **Recertify button**; this will open up the Recertify canvas with a Client eSignature disclaimer. Capture the client's recertification using one of the drop-down Signature Types, then scroll to the bottom of the page and click Save.

Recertify



If a client does not meet the age eligibility requirements, the CSFP tab will be greyed out.

3

Select tab Service once all the other tabs are complete, and scroll to the center of the page to **select the CSFP program** to begin intake. **Select Save on the bottom right once required information is filled in.** It's that simple!



If a client does not meet the eligibility requirements, the CSFP program will be greyed out.



If you have any additional inquiries, please feel free to ask the chat bot located at the bottom right corner of the screen by selecting the Link2Feed logo.

For other questions, please reach out to your manager for further assistance!