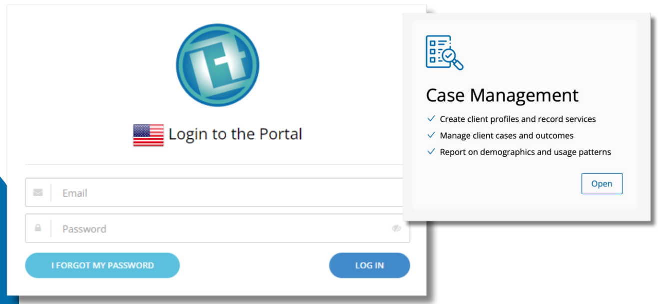
How to Log in & Record a Client Visit

Link2Feed

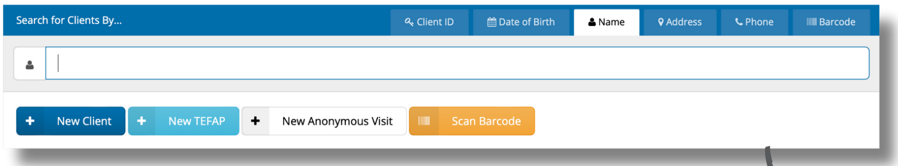
1

To access your organization's Case Management system, enter your email and password in the login fields. Then, choose your site from the drop-down menu within your Network. Select **Open** on the Case Management tile to record the client visit.



If you don't have access to more than one location, you won't have a drop-down menu available and will be directly logged into your location's site. If your location doesn't have multiple services with Link2Feed, you'll be automatically directed to Case Management.

2



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!

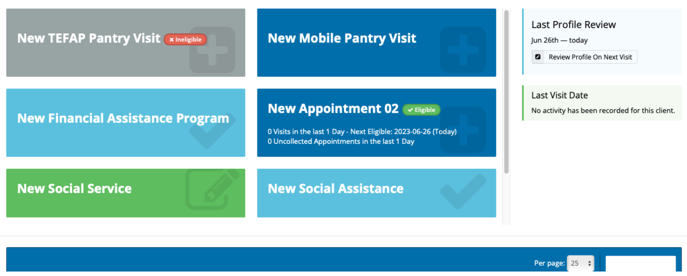
+ Add New Client

3

The Client tabs run across the top of the client's profile and are super helpful! You'll find all the required prompt information here. If you're entering a new client into the system, the tool will take you through all the information your organization requires. And if it's an existing client, the tool will attempt to fill in the missing information. To record a new client visit, select the **Service** tab.

4

When you're ready to record the client's visit, fill in the required information prompted by a pop-up or within the new page you've been directed to. Select **Save** on the bottom right once everything is filled in. Select tab **Service**, and scroll to the center of the page to select the program they came in to receive It's that simple!



Have additional inquiries?

Ask the chat bot! Just click the Link2Feed logo on the bottom right corner of the screen.

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