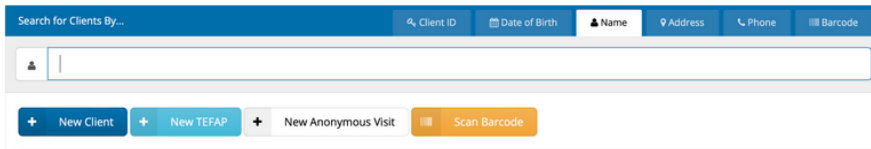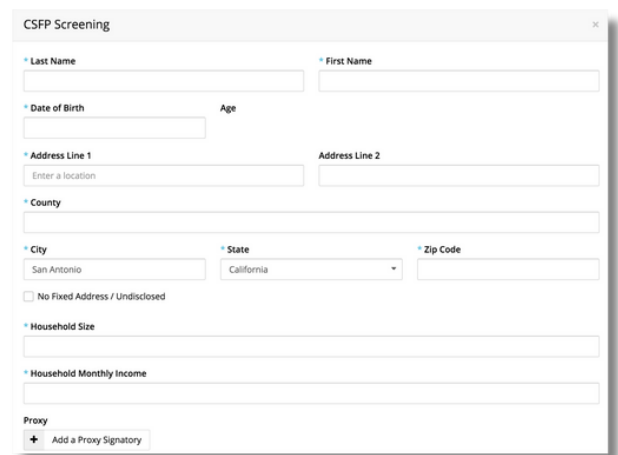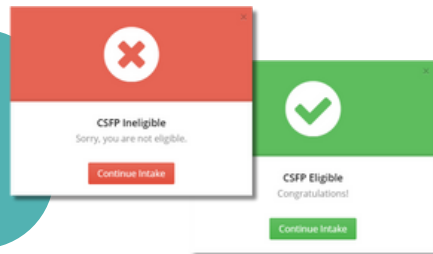# How to Record a CSFP Visit - Intake Staff

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.

Select the client, and view their **Service tab**, and Select the **CSFP Visit** button within the center of the screen,
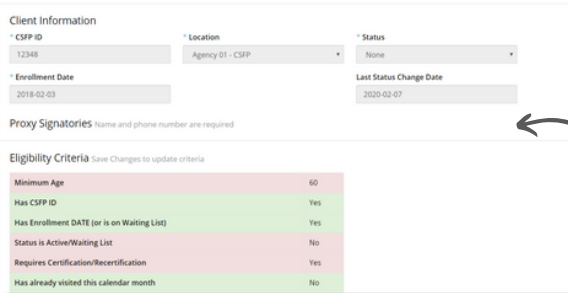
2

Clicking on the either **+ New CSFP button**, or **CSFP Visit button** through the **Services tab**, will lead you to a screening page before the intake process. Once completed, the system will tell you if, based on the household income and/or social programs, the client is eligible for **CSFP** or not.

If a client does not meet the eligibility requirements, the fields on the CSFP tab will be greyed out and the status will be automatically set to "Denied" or "None".

3

If eligible, you will be directed to the clients profile where you will find 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 complete the client CSFP application by **fill in 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.

4

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 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!