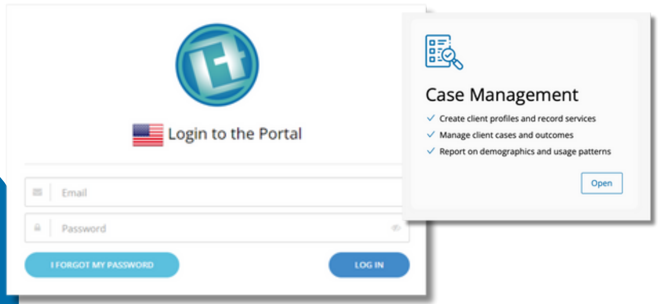
How to Log in & Record a Client Visit - Intake Staff

Link2Feed

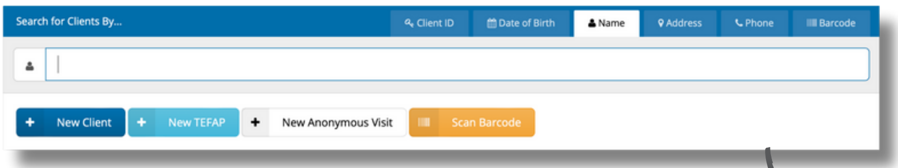
1

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

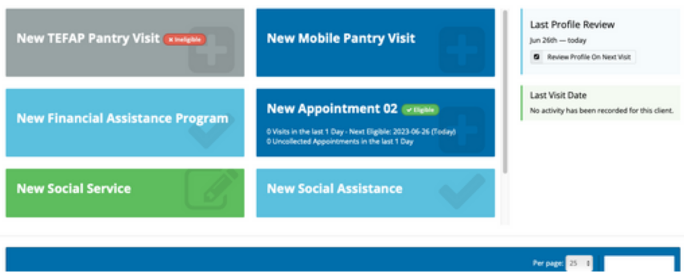
3

The Client tabs run across the top of the client's profile! You'll be guided to fill out all required information here.

If it's an existing client, the tool will attempt to fill in the missing information. **Select Save on the bottom right once everything is filled in.**

4

Select tab **Service**, and scroll to the center of the page to select the program the client came in to receive. **Select Save on the bottom right once required information is filled in. 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!