The Nuts & Bolts
PantryTrak 101

The Basics
Primer

Before jumping feet first into PantryTrak training, let’s get a couple things out of the way.

▪ **No Install** – it can be accessed anywhere there is a computer and internet connection at the url:

  https://pantrytrak.com

▪ **Flow** – most of the time, order of actions will be to move across the screen, right to left and then down the page

▪ **Use** – While there are a plethora of things PantryTrak is capable of, most users will be on the system for 3 reasons:

  Search ■ Sign ■ Serve

▪ **Links** – occasionally there will be links to better explain some functionality, you should notice them as the text will be blue and they will be underlined. Some will take you to a certain place in the document, while others will show you an article in the PT Help Desk. To reach the help desk articles, you will need to be logged into PantryTrak.
# Tech Prep General

<table>
<thead>
<tr>
<th>What you need</th>
<th>What you don’t need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer!</td>
<td>A large data plan! PantryTrak is very lean on bandwidth</td>
</tr>
<tr>
<td>Internet!</td>
<td>• 1 Month of PantryTrak, typically uses less data than a movie on Netflix</td>
</tr>
<tr>
<td></td>
<td>• 1 Hour of PantryTrak, less than 5 min YouTube video</td>
</tr>
</tbody>
</table>

![Diagram showing data usage comparison between PantryTrak and Netflix](https://via.placeholder.com/150)
Tech Prep Specifics

Internet

• A WiFi network in a building nearby. An access point may need to be installed to extend the reach of your network to your distribution site. The PantryTrak team can help you with that!

• A hotspot! Smart phones can be used as a hotspot.

Computers

• The number of computers you need depends on how many clients you serve per distribution. The average is 2-3 of any of the devices listed below:

• Laptops
  ▪ Windows XP or newer, Mac 2008 or newer, HP Chromebooks (Google/Chrome OS)

• Tablets
  ▪ iPad, Amazon Fire, Android Device
1. Navigate to the website by typing the URL.
   https://pantrytrak.com

2. Or if it's already bookmarked..

3. Click the Member Login button!
1. The next screen will prompt for a username and password and click login.

2. If you are training right now, you should be using the demo system. Please click the link to do so. demo.pantrytrak.com

FYI You can easily identify which site you are trying to access by looking at the URL.

*If you do not have a username or password please contact your food bank for assistance. These credentials only work for the demo system!
The first time you login to PantryTrak you will need to sign the Privacy Policy. Depending on your role at an agency, you may need to sign every time you login. Doing so, is very simple.

1. Feel free to read the policy, or click jump to signature

2. Type your name, type your initials

3. Click I Understand
Home Screen Overview

When you first login, there are a number of places you can go from the Main Menu. But let’s start with the aforementioned

Search ■ Sign ■ Serve

To get there we’ll first choose our **Event**, Food Pantry.

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**Serve Families on 05/01/2017**

- **Food Pantry**
- **Holiday Basket**
- **Produce Market**
- **CSFP Enroll**
- **Referrals**
- **Toys**
- **Offline Delivery**
- **Mobile Pantry**

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**Jump to day**

Select Event: **Food Pantry**

Choose a Date: 05/01/2017

Submit
Search Search

After clicking your Event, we’ll start to search for *Teddy Roosevelt*.

1. First by clicking the search box, then by typing `roo,t`. We do this because families are first found by the last name, and then narrowed by first name.

2. It turns out that there are two Teddy Roosevelt’s in the system (more on that later), but the one we’re looking for resides at 20 Sagamore Hill.

3. Once we have decided on the family, click on their name to move forward.

<table>
<thead>
<tr>
<th>Name</th>
<th>Info</th>
<th>Address</th>
<th>City, State</th>
<th>Zip</th>
<th>Last Served</th>
<th>Phone</th>
<th>Merge?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rooker, Tim</td>
<td>🔄</td>
<td>2010 36th Ave</td>
<td>Bedford Falls, PT</td>
<td>86801</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roosevelt, Teddy</td>
<td>🔄</td>
<td>1600 Pennsylvania Avenue</td>
<td>Ave, MS</td>
<td>86701</td>
<td>12/15/2016</td>
<td>614-564-1944</td>
<td></td>
</tr>
<tr>
<td>Roosevelt, Theodore</td>
<td>🔄</td>
<td>20 SAGAMORE HILL RD</td>
<td>Bedford Falls, PT</td>
<td>86801</td>
<td>04/18/2017</td>
<td>555-111-0080</td>
<td></td>
</tr>
</tbody>
</table>

**Add New Family & Visit**

*Service Visit list for Tuesday 06/02/2017, Food Pantry*
Search Update Info
Before signing, we'll just double check the family details.

1. Starting with address.
2. Then to family size and breakdown.
3. Further details, DOB, gender and active/inactive can be updated here.

Finally, click the tab at the top of the page for the Electronic Signature.
Sign/Serve Electronic Signature

Sign & Serve happen simultaneously; as the family presents their E-Sig, they are considered in the system. Of course, they will then be physically served by the pantry.

1. Name of the person actually signing their household position.

2. Now the keyboard is turned over to the family
   a) But first you will click inside the initials box
   b) Then only the client will input their initials
   c) You or the client will press the Tab button
   d) Then the client will press the Space Bar
PantryTrak 201

Home Screen Part 1
Home Screen Details

If you're brand new to PantryTrak, the last few slides may not have made much sense. On the other hand, if you have some experience, then hopefully it was a good refresher. Starting with the Home Screen let's walk through all of what's happening on each page.

1. Home screen link, if you are in Search, Quick Add and Quick Serve, this button will take you back to this screen.
2. Quick Add, explained [here](#).
3. Quick Serve, explained [here](#).
4. Logout, if you’re done serving families and/or using PantryTrak, this will take you out of the system.
5. Headings for each group of tools, the contents of these groups will be explained here, where they will likely make more sense.
Search Quick Add

It’s best to think of Quick Add as a ‘clean’ Search screen. Unlike the Regular view of the serving list, you will not see households you have served, reservations created or any other statuses. But all the rules and functionality are the same.

Regular Serving List

Quick Add
Quick Serve was developed specifically for managing a high volume distribution where a signature is not required.

Think of it as a tool that rolls searching and serving into one quick and easy process.

However, because of the prep and equipment involved, it is best explained in this Help Desk Article.

QUICK SERVE - Scan an Alt ID to add a family to Toys on Wednesday May 17, 2017.
(click to change event or event date)

Scan Alt ID...

There are 0 services events for Toys on 05/17/2017.

Click here to view all services for Toys on 05/17/2017.
Home Screen Events

Events, events in PantryTrak are all the programs an agency maintains. It’s also the first choice to be made when serving families.

1. Clicking the yellow buttons on the Home Screen will take you to Search and Serve clients for today’s date.

2. Jump to day, if you’re scheduling an Event in the future, or filling in past Events, this is one way to get there.

3. View recent listing of all your Events, click on a date.

4. Service history at a glance. Recent stats as well as a chart of your entire history of service you’ve entered into PantryTrak.
Search What is all this stuff?

1. Search box, be sure to click inside here before you start typing.
2. Search types, click to change. When it's orange, that means it has been selected.
3. Lists, explore different way of viewing reservations (made ahead of time) or served results.
4. Search results box, provides feedback on the type of search and number of results.
5. Since PantryTrak is lean on bandwidth, some things don’t constantly update. If you’ve added families to the Service Visit List and don’t see them, just click Reload Page.
6. 🔄 you’ll see these around PantryTrak when something needs explained or displayed.
7. Navigate to your (<<) last or next (>>) date of service.
8. If you have made reservations and are just looking for names on the list you can hide all of this.
Search Types

There are 4 different ways to search for clients, this page summarizes the way each works. The next few pages will provide more in-depth explanations.

Name search works by entering a portion of the last name, then a part of the first name. Separating the two parts by using a comma.

Address search can be done using the street number or name. Both work the same way.

Phone search works by looking at the last digits of the number, rather than the first three. Because area codes will easily max out results.

Alternate ID can be easily scanned or entered via the keyboard.
So far, we’ve seen a search for Teddy Roosevelt and Elsay Smith. Modeling your name search based on those examples should help you find any family. However, there is one more thing to consider when searching, how much of a difference a comma can make.

Even though it is possible to find families by just entering their last name, you should know that both the comma and a space act as a separator for the first and last name. Most of the time this is not an issue. But if you were search for Oscar De La Cruz, you can see where it would be a problem.

- In the first example search interprets the entered text as 2 letters of the last name, then 2 letters of the first name. Hence the results.

- But as we’ve now entered a comma, we can see the results have instantly changed.

The moral of the story, is that it is always best to use a comma to separate the first and last name.
Search Address

Address search can be done using the street number or name. Both work the same way.

- In the example, addresses starting or even ending with 543 will both be part of our results.
- Same with *Roll*, any street name with the word roll somewhere in it, will turn up. Even if it’s part of another word.
Phone search is simple than name or address, the only trick is to at least enter the last 4 digits of a client’s number. However, you may be thrown off when the digits you enter don’t appear to be in the results. Remember, this search covers both Phone 1 and Phone 2. So, by clicking on the household’s info, you will find that Phone 2 match your results.
Search Alternate ID

Alternate ID is far and away the easiest of search methods, as there will only ever be one result. What's more, is that upon scanning or entering, you'll be immediately taken to the Family Service Screen. The one key thing to remember is that you must click in the search box before scanning. Set up and a more in-depth explanation of how it all works can be found in the Help Desk [here](#).
Search How it Works

1. As illustrated on the previous slide, Search in PantryTrak works like a funnel. The more you type, the less results you get. But! Make no mistake, less is more.

2. Obviously, not every name will be like the example, yielding so many results. For many families, you may easily be able to find them after typing a few letters/numbers of their last name, or street address.

3. In the case of Elsay Smith, she is not the head of household* we have served, but our results box tells us that we should have stopped typing when we reached smi.elsa. Adding a y to the end of our first name did not give us any more results and so really we could have stopped when we reached smi,els.

*Sometimes you may find that a person is in PantryTrak, but not listed as the HOH. This is why it’s important to always search both Name and Address. But when you do serve a member over the age of 18 that is not the HOH, you can promote or make them searchable.
1. Families you have served and not served will be broken in two sections with those you have served always being on top.

2. Often, when searching for a household, there are many of the same names in the system. Some of these may even be duplicates. In the case of these two Roosevelt households, they at least have a different address. If they did not, a quick way to see a snapshot of the rest of the household and the service you’ve provided is to click the  button.

3. Not sure if you’ve served someone in the last 30 days? Last Served shows the date and type of service to a client.

4. Back to duplicates, when you do clearly see two of same family in the system, click Merge for both. This won’t automatically combine the two, but it does start the process that will be completed by PantryTrak support.
Search Lists

- Shows more info for both reservations and logged service records.
- Helpful for bulk-updating information.

<table>
<thead>
<tr>
<th>Service Visit #</th>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>County</th>
<th>Count Kids, Adults, Total</th>
<th>Family Status</th>
<th>JFS Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>830633</td>
<td>Johnson, Batman</td>
<td>1939 BATCAVE CIRCLE</td>
<td>Emerald City</td>
<td>Barrymore</td>
<td>3 + 4 = 4</td>
<td>Previously Served</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Last Name</td>
<td>First Name</td>
<td>Date of Birth</td>
<td>Age</td>
<td>Age Group</td>
<td>Gender</td>
<td>Time</td>
</tr>
<tr>
<td>Johnson</td>
<td>Batman</td>
<td>11/07/1947</td>
<td>69</td>
<td>65 - 64</td>
<td>F</td>
<td>M</td>
<td>07:00 AM</td>
</tr>
<tr>
<td>JOHNSON</td>
<td>ROBIN</td>
<td>05/03/1950</td>
<td>66</td>
<td>65 - 64</td>
<td>F</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>DRAKE</td>
<td>TIM</td>
<td>07/22/1995</td>
<td>21</td>
<td>18 - 24</td>
<td>F</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>KYLIE</td>
<td>SELINA</td>
<td>03/05/1993</td>
<td>24</td>
<td>18 - 24</td>
<td>F</td>
<td>M</td>
<td></td>
</tr>
</tbody>
</table>

Ages recorded for this visit - 1

<table>
<thead>
<tr>
<th>Service Visit #</th>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>County</th>
<th>Count Kids, Adults, Total</th>
<th>Family Status</th>
<th>JFS Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>830567</td>
<td>Roosevelt, Theodore</td>
<td>20 SAGAMORE HILL RD</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 4 = 5</td>
<td>Previously Served</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Last Name</td>
<td>First Name</td>
<td>Date of Birth</td>
<td>Age</td>
<td>Age Group</td>
<td>Gender</td>
<td>Time</td>
</tr>
<tr>
<td>Roosevelt</td>
<td>Theodore</td>
<td>10/27/1958</td>
<td>67</td>
<td>35 - 59</td>
<td>F</td>
<td>M</td>
<td>11:00 AM</td>
</tr>
<tr>
<td>Roosevelt</td>
<td>Alice</td>
<td>10/31/1951</td>
<td>54</td>
<td>35 - 59</td>
<td>F</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Roosevelt</td>
<td>Ethel</td>
<td>08/06/1951</td>
<td>54</td>
<td>35 - 59</td>
<td>F</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Roosevelt</td>
<td>Kermit</td>
<td>01/01/1950</td>
<td>66</td>
<td>65 - 64</td>
<td>F</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Roosevelt</td>
<td>Quentin</td>
<td>11/07/2007</td>
<td>9</td>
<td>5 - 17</td>
<td>F</td>
<td>M</td>
<td></td>
</tr>
</tbody>
</table>

Ages recorded for this visit - 9 [54, 54, 57, 66] 8
Search Lists

- Helpful for communicating between areas if food distribution is happening in an area separate from registration.
- Shows both reservations and logged service records.

Reservation list for Monday 05-15-2017, Mobile Pantry

<table>
<thead>
<tr>
<th>Check-in Order</th>
<th>Update Order</th>
<th>Check-in Status</th>
<th>Name</th>
<th>Address (Zip Code)</th>
<th>City</th>
<th>County</th>
<th>Kids, Adults, Total</th>
<th>Service Type &amp; Status</th>
<th>Time</th>
<th>Signed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td>Shopping Now</td>
<td>Johnson, Batman</td>
<td>1930 BACAYE CIRCLE (88803)</td>
<td>Emerald City</td>
<td>Barrymore</td>
<td>0 + 4 = 4</td>
<td>Produce Mobile Market Reserved</td>
<td>06.00 AM</td>
<td></td>
<td><img src="image" alt="i" /></td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Received their Food</td>
<td>Roosevelt, Theodore</td>
<td>20 SAGAMORE HILL RD (88901)</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 4 = 5</td>
<td>Pantry - Choice - 3 day Served</td>
<td>11:00 AM</td>
<td>e</td>
<td><img src="image" alt="i" /></td>
</tr>
</tbody>
</table>
**Search Lists**

- Similar to serving list, but only shows families you have yet to check in
- Can be used as a more private version of your search screen because it hides service records

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**Reservation list for Monday 05-15-2017 , Mobile Pantry**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>County</th>
<th>Count Kids, Adults, Total</th>
<th>Reservation Status</th>
<th>Time</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnson batting</td>
<td>1939 BATCAVE CIRCLE (60503)</td>
<td>Emerald City</td>
<td>Barrymore</td>
<td>0 + 4 = 4</td>
<td>Reserved</td>
<td>06:00 AM</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries
Search Lists

- Only shows service events that are reserved.
- Again, tracks a client's status during service.

Reservation list for Monday 05-15-2017, Mobile Pantry

<table>
<thead>
<tr>
<th>Check-in Order</th>
<th>Update Order</th>
<th>Check-in Status</th>
<th>Name</th>
<th>Address (Zip Code)</th>
<th>City</th>
<th>County</th>
<th>Kids, Adults, Total</th>
<th>Service Type &amp; Status</th>
<th>Time</th>
<th>Signed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td></td>
<td>Shopping Now</td>
<td>Johnson Batman</td>
<td>1939 BATCave Circle (68503)</td>
<td>Emerald City</td>
<td>Barrymore</td>
<td>0 + 4 = 4</td>
<td>Produce / Mobile Market Reserved</td>
<td>06:00 AM</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries
### Search Lists

- If an agency does not have internet access during their distribution, they can create reservations ahead of time, print out the list, and use it as a paper check list.
- Can quickly change service status.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>Count Kids, Adults, Total</th>
<th>Service Type</th>
<th>Reservation Status</th>
<th>Time</th>
<th>Notes</th>
<th>Quick Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnson, Batman</td>
<td>1333 BATCAVE CIRCLE (88803)</td>
<td>Emerald City</td>
<td>0 + 4 = 4</td>
<td>Multi Service</td>
<td>Reserved</td>
<td>06:00 AM</td>
<td>i</td>
<td></td>
</tr>
</tbody>
</table>

Service Visit # - PTSE830833

Showing 1 to 1 of 1 entries
Search Service Statistics

In the course of serving households, the list can sometimes get pretty long, pretty fast. If you’re curious about the numbers for a given day, the bottom of the search page will provide that information. Before doing so, to get the most current count be sure to click the button.

Additionally, if you’re in charge of an agency the button offers the opportunity to download the day’s list, regardless of status.

<table>
<thead>
<tr>
<th>Visits - 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Visits by Time Slot</td>
</tr>
<tr>
<td>10:00 AM - 3</td>
</tr>
</tbody>
</table>

**Stats**
- Total Families Served - 1
- NEW Families Served - 0
- No Show - 1
- Families without Children - 1
- Families with Children - 0
- Total Individuals - 3
- Children - 0
- Adults - 1
- Seniors - 2

**Family Size**
- 1-3 - 2
- 4-6 - 1
- 7+ - 0

**Service Summary**
- Pantry - Choice - 3 day - 1

**Download CSV**
- Update Group Counts for Served records

Show/Hide Optional Reporting Fields
Search Add a New Household

So, what happen when we cannot find a family?

Since we couldn’t find *Elsay Smith* before, we will need to add her to the system.

To start this process, just click the red text Add New Family & Visit link below the search box.
Search Add a New Household

Adding a new household should be pretty intuitive, in terms of only requiring the basic information found on the Family Service Screen.

However, one thing to help prevent duplicates is that the name and address you enter will be searched against what is currently in PantryTrak. This also may be a little confusing because they work independently of one another. So, while there isn’t an Elsay Smith in the system, if she lived on 1939 Batcave Circle, that is an address that PT recognizes.

In any case, if for some reason searching for a household didn’t seem to work but the result offered when you try to add them appear correct, just click the on the name like you normally would in search.
Search **Add a New Household**

Before getting to the next step, remember that for all the fields you will need to input or check each one.

If you have missed something, like the Zip Code. The screen will prompt you and not allow you to move on.

But once you’ve added that piece of information, click Next!
Search Add a New Household

The next screen offers the opportunity for two more pieces of information to be input before adding the family.

1. If you have time and know the other household member details, names, DOB etc. feel free to do so here. If not, you can so later.

2. If you're adding households to PantryTrak from TEFAP forms, you may have a number of historical visits to associate with them. This would be the spot to add those dates. If not, you can do so later.

3. Finally, when you're ready to complete your inputs, click Add!
Search What Happened?

If you added the household for today’s date, then you’d find yourself in the next section, all about the Family Service Screen.

But! If you’re adding historical records having used the Jump to a Day function under Events, then you’ll end up seeing a screen similar to this.

So, you have two options. If you need to edit more information about the household or their services, click the numeric blue underlined link. If not, click the yellow Close Window button.

Add a NEW Family and Service History Record for Monday May 1, 2017 - Step 3 of 3

- Please wait a moment while we process the information

Head of Household: Elsa Smith. Member ID 690752 was added to the database.
Family ID 184826 was added to the database for Elsa Smith.
additional family members ready to be added
Family Member Senior1 Smith, Member ID 090753 was added to the database.
Family Member Child1 Smith, Member ID 690754 was added to the database.
Historical Service Record 533555 was added to the database for Elsa Smith on 05/01/2017.

Close Window

All Done, click Close to return to prior menu OR click one of the links above to go to that Service Visit.
Main HOH Address

The name in the yellow box on the Main tab is considered the head of the household and the primary name driving search results. Two things to keep in mind when updating the information in this section.

1. In the first example, we’ve changed the Zip Code to one that exists in two different counties. Don’t worry too much about picking the right county. Even if it’s wrong, tools inside of PantryTrak (our Geocoder) will fix it!

2. When you check the box to change a household’s address to Homeless you’ll notice a new address is automatically entered. It should look familiar as it’s the address of your agency. The reason, is that if we don’t give the household an address, then we cannot give the client representation during mapping.
**Main Service Details**

All service details can be easily changed at the point of service on the Main tab. The menu to do so is sandwiched between the address and household members.

1. **Service Provided**, the default service under the event.
2. Date and time defaults to today's date and hour of service.
3. Optional Reporting is not shown by default, click the (Show) button. You'll then be given the option to input Pieces, Pounds, Dollars and Description.
4. If you have changed the service provided you may also want to change where service statistic where it will accrue.
5. If there is more than one service provided during the course of the transaction, you can add each with the use of this button (also at the bottom of the page). Just be sure to change each accordingly under Service Provided as they will be added as the default service.
Main Household Members

Active and Inactive members will appear on the Main tab. If they have any other status, members can be found on the Family Members Tab. Additionally, the ability to edit First and Last name can be done there as well.

1. Notice, Family Size (located above the Notes box) is indicative of only members that are Active.

2. Disability status is not something that always is seen on the Main tab. Instead, it can be found on the Additional Info tab. However, if there is a status found on another tab that would be helpful to your organization, contact your food bank.

3. Active or Inactive, is an tool for easily taking members out of the household. For example, if grandparents are taking care of grandchildren for the summer, this is the way to include and remove them.

4. Need a to add a person to the household, click the Add Family Member! Afterward, the green box to fill in their details will appear below.
Main Signature

How did they sign… or did they sign?

- When you first create a reservation, none of options will be selected.

  **HOW DID THEY SIGN?**
  
  | Signed Paper Form | Signed Electronic Form | Not Required | Required, NOT Signed |

- If you're using E-Signature, it's easy. Signed Electronic Form will be automatically selected after the signature is complete.

  **HOW DID THEY SIGN?**
  
  | Signed Paper Form | Signed Electronic Form | Not Required | Required, NOT Signed |

- If you're not using E-Signature, but you want to account for paper records, you'll need to click Signed Paper Form.

  **HOW DID THEY SIGN?**
  
  | Signed Paper Form | Signed Electronic Form | Not Required | Required, NOT Signed |
Main Service Visit Status

Service Visit Status is an identifier that helps you keep track of if a service was provided. When a service event is created, it always defaults to the Reserved status.

**SERVICE VISIT STATUS:**

- **Reserved**
- **Served**
- **No Show**
- **Cancelled by Client**
- **Cancelled internal**
- **Duplicate void**
- **Rescheduled**

**Reserved**

Default status when service events are created. If Reserved is highlighted this indicates either two things. It means that either the client has a reservation at your location or that you looked at their record but no service was provided.

**Served**

When a family signs electronically, their status will automatically be changed to served. If the service is historical or the family signed on paper, just click this button! If Served is highlighted, that indicates the client has been served and their service will be counted towards your monthly report. **This is very important**, if your numbers seem low for the clients you typically serve, you may want to look back at your service dates to be sure you see plenty of green served statuses.

**No Show**

No Show means that the client had a reservation but did not arrive at the site.
Cancelled by Client is used when a client has contacted the site to cancel that reservation.

Duplicate void is used when you make a mistake on a reservation and it needs to be removed from your serving list. You can either highlight Canceled Internal or Duplicated void and this will delete the record at a later time.

Cancelled by Client is used when a client has contacted the site to cancel that reservation.

If the client has reservation is made but it is rescheduled you can highlight the Rescheduled option.
Main Alt ID

The full explanation of Alt ID can be found in this HESK article, but what you need to know from the Main tab is that there are two ways to setup a client with an Alt ID.

- The first and easiest is to click the Alt ID Cards notepad icon. This will open a new tab where you can print two ID cards for the family.

- The second, is a bit more involved and will require use of an existing keytag/barcode from the client that you will then attach to their PantryTrak ID. Again, this is thoroughly explained in the aforementioned article. This can be edited on the Family Members Tab as well.
Main Printing

Printing, I thought this is electronic?

- In the instances where PantryTrak would need to be offline, you can at least print your TEFAP form with the client’s information already filled out!
- If you’re definitely serving them today, you can add the date already filled in or without.
Main Numbers & New Families

At the very bottom of the Main tab are two fields that will impact the lists discussed in Search and reporting.

- If you would like to issue a number to clients as they arrive or track their status, the selections can be made here and will be reflected in both the Serving and Serving/Check In lists.

- Even though you may have served a household many times before, if the agency was not able to import data and have not input paper information, every household they serve will be a New Family, the first time. Even if they’re not new to the system.

- If you decide to change a household to previously served, this will be reflected in reports by changing the numbers of New families.

- You can easily see which are your New families on the Search page (date dependent) as they will have a blue New Family box next to their Service Event.
E-Signature Privacy

At the point where you’re ready for a client to render their E-Signature, the client must be able to see/view the screen.

- First, they will see the Privacy Policy which they are not required to sign.

- But if they would like to read more of the policy, click Show All Items, which will display the full Summary.

If the client would like a copy emailed, type their email address and click the Email Requested button.

Privacy Policy Summary
1. Reading this Summary document is not a substitute for reading the PantryTrak Privacy Policy in full.
2. Your privacy is important to Mid-Ohio Foodbank and the foodbanks, food pantries, and other service providers that use the PantryTrak System to help process and record your requests for food, assistance, or other client services.
3. Personal Data may be used by service providers to make referrals to other service providers, inform clients about services they may be eligible to receive, and connect clients to resources and information that may be beneficial to them.
4. Personal Data will not be sold for direct marketing purposes.
5. The Privacy Policy may change at any time; the most current version can be found at www.pantrytrak.com/privacy. Click here to view it now.

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5. The Privacy Policy may change at any time; the most current version can be found at www.pantrytrak.com/privacy. Click here to view it now.

If you would like to receive a copy of the Privacy Policy via email, please provide your email address and click “Email Requested”. We will send a copy of the Privacy Policy to you via email.

Email Address: speaksoftlycarryabagsticks (optional) Email Requested
- For locations not using E-Signature, that tab will be replaced and the process is mostly the same

- However, since the client will not be seeing E-Signature form there is a reminder to show and/or advise them of it between signing and visit status. Once you have done so, just click Yes.
E-Signature General & Household Position

Next, though we covered the E-Signature form earlier, there are a few other things to keep in mind during this part of the process.

1. If someone else besides the HOH is signing this form, please indicate that change by typing the actual Name of Person Signing.

2. Also, please be sure to change the position to Household Member or Proxy.

3. Finally, remember that only the client should ever be typing their initials. In the case of a Proxy the question is often asked if they should by typing their initials or someone else’s, it’s always their own initials.

Occasionally, a client may unwittingly add an extra letter to their initials, this is perfectly fine. Their digital (e)signature is no different than their written signature, as they would not change or modify the written, there is no need to do so with the electronic version.
Service History

Service History, is pretty much what it sounds like, the history of services you have provided to a client, with the details of the service and family and at the time of service.

Can serve as a good way to see service events that remain unserved/Reserved.

Only place to see past Service Visit Notes.

<table>
<thead>
<tr>
<th>Date</th>
<th>Parent Service Event</th>
<th>Kids</th>
<th>Adults</th>
<th>Seniors</th>
<th>Total</th>
<th>Event</th>
<th>Service Type</th>
<th>Service Category</th>
<th>Signed?</th>
<th>Service Visit Status</th>
<th>Pounds</th>
<th>Pieces</th>
<th>Dollars</th>
<th>Service Description</th>
<th>Service Visit Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/09/2017</td>
<td></td>
<td>1</td>
<td>4</td>
<td>0</td>
<td>5</td>
<td>Food Pantry</td>
<td>Choice Pantry</td>
<td></td>
<td></td>
<td>Reserved</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/10/2017</td>
<td></td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>6</td>
<td>Food Pantry</td>
<td>Choice Pantry</td>
<td></td>
<td></td>
<td>eSign</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/09/2017</td>
<td></td>
<td>1</td>
<td>4</td>
<td>0</td>
<td>5</td>
<td>Food Pantry</td>
<td>Choice Pantry</td>
<td></td>
<td></td>
<td>Reserved</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Notes

A note about… notes

- Notes are private to your location
- Notes exist/repeat in a few places
- Notes on the **Main** tab also appear under the **Notes** tab
- Service Visit Notes under the notes tab are saved under the corresponding visit under the **Served Last on** tab

### FAMILY NOTES:
(These notes are only visible to users from your agency, and will be displayed any time you are serving this family.)
Alice is allergic to Kale.

### SERVICE VISIT NOTES:
(These notes are linked specifically to this Service Visit, and are only visible to users from your agency.)
Teddy was in rare form today.
Additional Info

Additional family level data points.

1. Change the default language of E-Signature form. Please note, the languages made available are determined by the state. In other words, if a paper copy does not exist, then it cannot be translated for PantryTrak.

2. Add/edit income details.

3. Add housing details.

4. Add disability status.

5. Add SNAP information.

6. Email!
**Family Members Add & Promote**

The Family Members Tab, is the place to edit all the details of the household.

As with the Main tab, there is an opportunity to add a single household member. Or in bulk, creating them through the multiple placeholder tool.

If the head of household moves out, dies or simply is not the primary person coming to the agency, it may be time to consider a promotion.

- Members eligible will be those with a valid birthdate and are over the age of 18.
- To make your choice, simply click next to the members’ name and click the promote button.
Family Members Info, Status & Searchable

1. If there are edits/changes to names, that can be done here.

2. Any Status beyond Inactive is not available on the Main tab and changes must be made here.
   - Permanent Inactive, someone who is likely not returning to a household
   - Deceased, instructions for single member households where the client has died can be found here.
   - Delete, if you have mistakenly created a household member

3. In the previous slide, we saw how a member can be promoted. But if you would still like to keep them actively searchable or make others easily found, this is the place to do so.

4. Deeper individual data points about each member are accessed by clicking the + sign.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle</th>
<th>Last Name</th>
<th>Suffix</th>
<th>Date of Birth mm/dd/yyyy</th>
<th>Age Group</th>
<th>Gender</th>
<th>Status</th>
<th>Searchable</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theodore</td>
<td>J</td>
<td>Roosevelt</td>
<td></td>
<td>10/27/1958</td>
<td>57</td>
<td>M</td>
<td>HOH</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Kermit</td>
<td></td>
<td>Roosevelt</td>
<td></td>
<td>01/01/1950</td>
<td>66</td>
<td>M</td>
<td>Active</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Alice</td>
<td></td>
<td>Roosevelt</td>
<td></td>
<td>10/31/1961</td>
<td>54</td>
<td>M</td>
<td>Inactive</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Edith</td>
<td></td>
<td>Roosevelt</td>
<td></td>
<td>08/06/1961</td>
<td>54</td>
<td>M</td>
<td>Permanent Inactive</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Quentin</td>
<td></td>
<td>Roosevelt</td>
<td></td>
<td>11/07/2007</td>
<td>9</td>
<td>M</td>
<td>Deceased</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
Family Members Additional Information

Adding additional member level data points can be useful in pursuing grants, or just getting to the know the population you serve a little better. Like the additional household info, none of this is a requirement (unless mandated by your service territory) and should not serve as a barrier to service.

Please keep in mind that the input fields offered have not been arbitrarily chosen by the PantryTrak team. In fact, they are what has been made available on the current US Census.

If any single one of these category are of interest, it can be moved to the Main tab. Please contact your food bank, or the PantryTrak team to make this change.
Finish Close, Save, Reload

If you’ve been curious up to this point about where the save button is in PantryTrak, well… there isn’t one. What you may noticed along the way, is that every time a change is made in a field, a little green dot appears somewhere on the screen. When you see that, your changes have been saved.

Along with saving, you also may have noticed that some changes aren’t immediate. The truth is, behind scenes things have changed but will only appear to the user after clicking the Reload button. There aren’t too many places where this is necessary, but as mentioned in the beginning, it is part of what helps keep the system so lean on bandwidth.

So, you’ve finished serving a client and/or updating their household information. Whether you’re ready to move on to the next client or finish for the day, how do you leave the Family Service Screen? Two choices:

▪ Click the close window button at the top or bottom of the screen.
▪ Or just close the tab titled ‘Service Visit Update.’
PantryTrak 201

Home Screen Part 2

PANTRYTRAK
Service History Lookup

History Lookup offers the opportunity to view households and past services using the familiar search screen, but without creating service events when clicking on the head of household’s name.

Family History - Lookup a FAMILY and Find Most Recent Service Visit

ADD NEW Family & Reservation

<table>
<thead>
<tr>
<th>Name</th>
<th>Info</th>
<th>Address</th>
<th>City, State</th>
<th>Zip</th>
<th>Last Served</th>
<th>Phone</th>
<th>Merge?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roosevelt, TEDDY</td>
<td></td>
<td>1600 PENNSYLVANIA AVE</td>
<td>Bedford Falls, PA</td>
<td>88801</td>
<td>05/03/2017</td>
<td>555-111-0000</td>
<td></td>
</tr>
<tr>
<td>Roosevelt, Theodore</td>
<td></td>
<td>20 SAGAMORE HILL RD</td>
<td>Bedford Falls, PA</td>
<td>88801</td>
<td>05/16/2017</td>
<td>555-111-0000</td>
<td></td>
</tr>
</tbody>
</table>

User Tips:
This QUICK FIND function is only designed to lookup Families that have already been SERVED at your pantry. It will take you to the last served record, but NOT let you create a new Reservation/Service Event for a family.

To create a new Reservation/Service Event please use QUICK ADD
We have a Privacy Policy because it is the right way to protect our clients and their data. Also, to set guidelines for PantryTrak users and Food Bankers to know:

- What we can do with data
- What we can’t do with data

Protects us, agencies, clients from inappropriate use of personal data.

The policy is available in full via the link titled Privacy Policy.

But to help address questions, concerns as well as give clients a more leisurely opportunity to read the information, we highly recommend all agencies print and post the Privacy Policy Posting via the link on the Main Menu.
Though we’ve covered a lot here, there’s still so much more to learn! Many of the topics covered throughout this training are explored more thoroughly under articles inside the PT Help Desk.

Additionally, if you still cannot find an answer, please submit a ticket and the PantryTrak team should respond within 24-48 hours.
Where does all of this information go? The work you have done serving families and/or inputting paper records aggregates under reports.

To access, look under the Reports section on Main Menu.

1. Main Pantry Report, only pantry events
2. Pantry service and Produce Events

Once there, you will have two choices.

3. If you only need to most recent month’s stats, just click the respective month.
4. For a more specific search of a certain date or event try the other options below.
Reports Main Pantry Report

Regardless of the time or criteria you would like to include, you will end up with a report that looks something like this.

For most that come here, the key stats you are responsible for providing for to your food bank can be found at the top of the page in the first few boxes.

Duplicated Vs. Unduplicated

1 family makes 4 visits
- Un-duplicated count of 1
- Duplicated count of 4
Reports  Main Pantry Report

The rest of this report covers demographics, geography, service totals and frequency distribution.
The Analysis & Learning Center is where you can access specialized reports on the service your agency does. While you can access basic reporting on your agency via the Main Pantry Report, the Analysis & Learning Center offers the opportunity to specify exactly which types of data you want to see, to include the date range in which you would like to search.

Many reports in this section started as a request for information from food banks and agencies. So, if there is piece of data you have put into PantryTrak but can’t seemed to find an easy way to pull out, look for it here! And if you still can’t find it, reach out to your food bank or the PantryTrak support team.

FYI, because of the ability to export all the information about the families you serve ALC reports are only available to Directors, Managers and Assistant Managers of agencies.

To access look under Reports section on Main Menu, and click Analysis & Learning Center.

Have a question? Find an Answer!
It is best to start by scrolling down the page to see what’s available. However, if you have something more specific in mind, there are few ways to find what you are looking for.

1. If you already know what you’re looking for, try the search box.

2. Want to see what’s been recently added or sort by name? Click the triangles in the column headers.
Manager Tools  E-Signature Audit

Removing the burden of paper record keeping has been the key to the growth of PantryTrak in saving agencies time while improving our ability to be compliant. While PantryTrak does not completely solve compliance issues, it does solve some of the more basic ones, while creating an audit trail to honestly and accurately represent what we have and have not recorded through the system.

To that end, PantryTrak has an e-signature audit report so that an agency manager can examine their pantry’s signatures to determine if they have missed anything.

- To access, look under the Manager Tools section on Main Menu, and click **eSignature Audit Report**
- This will take you to a screen that looks similar to your reports. You can then click on the month you would like to examine. If you would like more specific options, they are below the standard by location, by month option.
Manager Tools E-Signature Audit

- When you click on a month, it will take you to a list of services you have provided, broken into two sections: Services with e-signatures, and services without e-signatures. The example of the first section is below.

<table>
<thead>
<tr>
<th>Date of Service</th>
<th>Service Visit #</th>
<th>Head of Household</th>
<th>Address City, Zip</th>
<th>Phone</th>
<th>Kids, Adults, Seniors, Total</th>
<th>Service Received</th>
<th>Form Type</th>
<th>Signed By</th>
<th>Signature Initials</th>
<th>Household Position</th>
<th>Income Limits</th>
<th>Signed on</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-06-06</td>
<td>630477</td>
<td>Elmier</td>
<td>32 Main St Bedford Falls 88801</td>
<td>937-354-6877</td>
<td>0 + 1 + 2 = 3</td>
<td>Pantry - Choice - 3 day</td>
<td>26</td>
<td>68801, Elmier</td>
<td>SE</td>
<td>head of household</td>
<td>320391(22498)615</td>
<td>2017-06-06 08:41:43</td>
</tr>
<tr>
<td>2017-05-05</td>
<td>630464</td>
<td>Leonce Allemond</td>
<td>1059 Patin Street BREAUX BRIDGE 70517</td>
<td>337-228-2408</td>
<td>0 + 0 + 2 = 2</td>
<td>Pantry - Choice - 3 day</td>
<td>26</td>
<td>Allemond, Leonce</td>
<td>LA</td>
<td>head of household</td>
<td>320391(22498)616</td>
<td>2017-06-06 16:08:19</td>
</tr>
<tr>
<td>2017-05-12</td>
<td>630578</td>
<td>Betty Berry</td>
<td>619 CEREAL RD Cabot Cove 88702</td>
<td>302-599-6180</td>
<td>2 + 2 + 1 = 5</td>
<td>CSFP</td>
<td>20</td>
<td>Berry, Betty</td>
<td>BBB</td>
<td>member of household</td>
<td>II</td>
<td>2017-06-12 11:11:45</td>
</tr>
</tbody>
</table>

- After you go through the section for services with e-signatures, you will arrive at the section for services without e-signatures. All services you provided without e-signatures will be listed here regardless of the type of service.
Index

Vocabulary
**Event** | An event in PantryTrak are all the programs an agency maintains. It's also the first choice to be made when serving families.

Below shows how to identify what Event you are under on throughout the system.
**Service Event** | A Service Event, as you might guess, is part of an Event. Simply, it is the services provided under a particular program, or Event. In the real world, a Service Event would be the documentation associated with a visit to receive service/assistance.

In PantryTrak, Service Events are used interchangeably with the word Reservations, as every Service Event begins with the status of Reserved.

Below shows how to identify Service Events throughout the system.
Status | descriptor for the current state of a service event.
Feel free to practice or continue training in PantryTrak Demo with username and password supplied during your training.

If you have any questions about PantryTrak, feel free to contact your local Foodbank for assistance.

Remember, don’t panic if you make a mistake in PantryTrak, most things can be corrected.