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Advanced **FreshTrak**




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A regional agency of Catholic Charities and a member of Feeding America

Search for a Household

I'm searching for **George Food-Flamingo**.
How should I search for him?

-  Food-Flamingo, G
-  Food, G THEN  Flami, G

What about **Xylophone O'Food**?

- 
-  O'Food, x
 -  Ofood, x
 -  O, xylo

Tips and tricks:

For hyphenated names, try searching by one or the other of the last names, NOT both at once.
> You won't get any more results, and you'll often get fewer!

For names with apostrophes in them, put the first initial of the last name, and then search with the first several letters of the first name.
> This way it will pull up the client whether they were entered with an apostrophe or not!

Search for a Household

What about Bob Food?



Food,



...If it's not a
common
last name



Tips and tricks:

OR, try both names:



Food, Robert



Food, Bob

You don't need a full last name to search, and in fact it usually works better if you just put in the first several letters of the last name, and then a first initial.

And what about Iguana Ffyud?



F, Igu

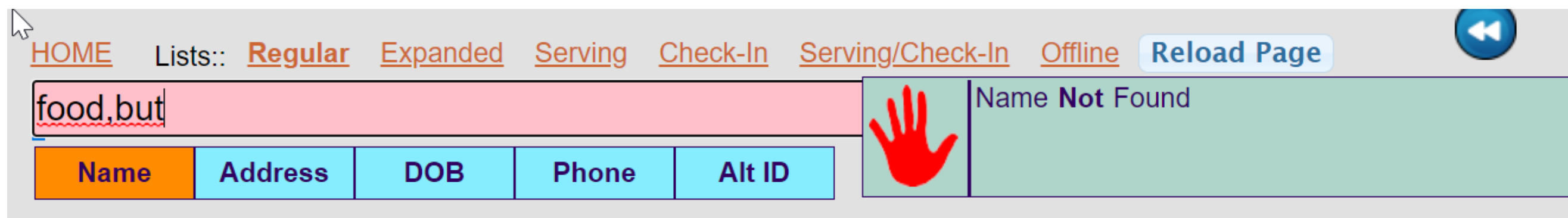


This is a last name that may have been misspelled at first, so it might be hard to find if you type the whole last name in.



What if there are multiple adults who pick up for the same household?

I'm searching for Button Food.



No results found.



But I'm pretty sure she's been here before...



What if there are multiple adults who pick up for the same household?

I'm searching for Button Food.



Ask if there's another name in the household it might be under!

This household is under the name Boyle Food.



How do I make it easier for next time?



What if there are multiple adults who pick up for the same household?

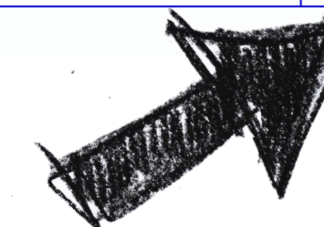
1 Click on the "Family Members" tab at the top.



2 Scroll down until you see a list of family members.

| First Name | Middle | Last Name | Suffix | Date of Birth mm/dd/yyyy | Age | Age Group | Gender | Status | Searchable | Updated? |
|------------|--------|-----------|--------|-----------------------------|-----|-----------|--|---|---|--------------------------------------|
| Boyle | | Food | ▼ | 12/12/1990 | 30 | 25 - 34 | <input type="radio"/> F <input checked="" type="radio"/> M | HOH | | |
| Child | | Food | ▼ | 12/12/1990 | 30 | 25 - 34 | <input type="radio"/> F <input checked="" type="radio"/> M | <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Permanent Inactive <input type="radio"/> Deceased <input type="radio"/> Delete | <input type="radio"/> Yes <input checked="" type="radio"/> No | |
| Button | | Food | ▼ | 10/10/2000 | 20 | 18 - 24 | <input checked="" type="radio"/> F <input type="radio"/> M | <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Permanent Inactive <input type="radio"/> Deceased <input type="radio"/> Delete | <input checked="" type="radio"/> Yes <input type="radio"/> No | ● |

3 In the "Searchable" column, mark **button** as YES.



What if there are multiple adults who pick up for the same household?


HOME Lists: [Regular](#) [Expanded](#) [Serving](#) [Check-In](#) [Serving/Check-In](#) [Offline](#) [Reload Page](#)

Search: food,but

Found 1 matches - Hover over the info icon to see more information, Clicking the link will add the visit immediately.

RESET Exp

| Name | Address | DOB | Phone | Alt ID |
|------|---------|-----|-------|--------|
|------|---------|-----|-------|--------|

| Name | Info | Address | City, State | Zip |
|--|---|-----------------------|-------------|-------|
| 1 Families that You Have Served | | | | |
| Food, Button (Food, Boyle - HOH) |  | 388 UPPER OAKWOOD AVE | ELMIRA, NY | 14903 |

Success!



Cleaning up accidental household members

I accidentally added an extra adult to Preserve Food's family.

| First Name | Middle | Last Name | Suffix | Date of Birth mm/dd/yyyy | Age | Age Group | Gender | Identification | Status |
|--------------------------|--------|-----------|--------|-----------------------------|-----|-----------|---|--|--|
| Preserve | | Food | | 01/01/1956 | 65 | 65 - 84 | <input type="radio"/> F <input checked="" type="radio"/> M <input type="radio"/> O | <input type="radio"/> Needed <input checked="" type="radio"/> Verified | |
| Adult | | Food | ▼ | 03/30/2000 | 21 | 18 - 24 | <input type="radio"/> F <input checked="" type="radio"/> M <input type="radio"/> O | <input type="radio"/> Needed <input checked="" type="radio"/> Verified | <input type="radio"/> Active <input checked="" type="radio"/> Inactive |



I marked the extra adult "Inactive," but they still show up here in yellow. How do I get rid of them?

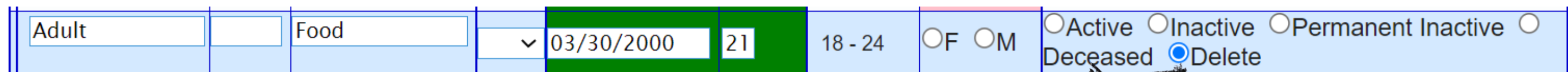
Cleaning up accidental household members

I accidentally added an extra adult to Preserve Food's family.

1 Click on the "Family Members" tab at the top.



2 Mark the extra household member as "Delete."



Cleaning up accidental household members

I accidentally added an extra adult to Preserve Food's family.

| First Name | Middle | Last Name | Suffix | Date of Birth mm/dd/yyyy | Age | Age Group | Gender | Identification | Status |
|--------------------------|--------|-----------|--------|-----------------------------|-----|-----------|--|--|--------|
| Preserve | | Food | | 01/01/1956 | 65 | 65 - 84 | <input type="radio"/> F <input type="radio"/> M <input type="radio"/> | <input type="radio"/> Needed <input checked="" type="radio"/> Verified | |

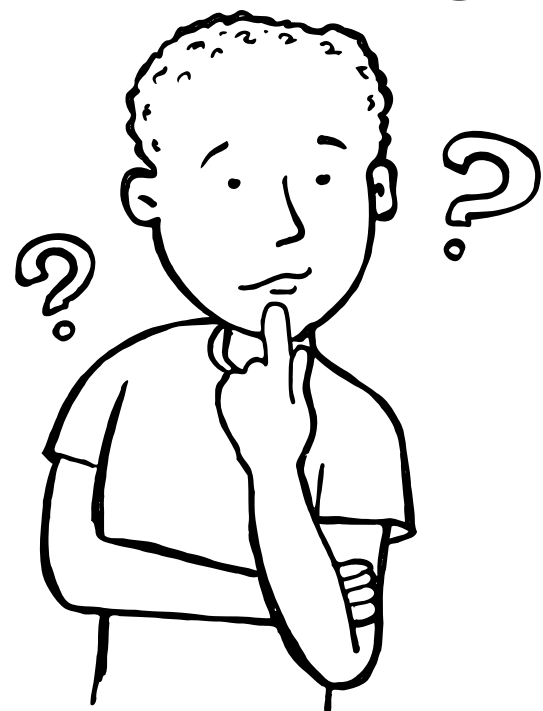


ALL SET



Marking household members as deceased

I'm serving June Food, and she tells me that Line Food passed away recently.



I could just mark Line as "inactive."

But, she's still going to show up (highlighted in yellow) on future visits. I don't want to ask, "Did Line move back in?" and have to have an awkward conversation.

| First Name | Middle | Last Name | Suffix | Date of Birth mm/dd/yyyy | Age | Age Group | Gender | Identification | Status |
|------------|--------|-----------|--------|-----------------------------|-----|-----------|---|--|--|
| June | | Food | | 02/13/1977 | 44 | 35 - 59 | <input type="radio"/> F <input checked="" type="radio"/> M <input type="radio"/> O | <input checked="" type="radio"/> Needed <input type="radio"/> Verified | |
| Curve | | Food | | 01/01/2011 | 10 | 5 - 17 | <input type="radio"/> F <input checked="" type="radio"/> M <input type="radio"/> O | <input checked="" type="radio"/> Needed <input type="radio"/> Verified | <input checked="" type="radio"/> Active <input type="radio"/> Inactive |
| Line | | Food | | 06/06/1978 | 43 | 35 - 59 | <input checked="" type="radio"/> F <input type="radio"/> M <input type="radio"/> O | <input checked="" type="radio"/> Needed <input type="radio"/> Verified | <input type="radio"/> Active <input checked="" type="radio"/> Inactive |

Marking household members as deceased

I'm serving June Food, and she tells me that Line Food passed away recently.

Instead...

1 Click on the "Family Members" tab at the top.

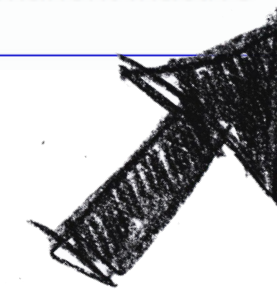


2 Scroll down until you see a list of family members.

+ Show Additional Information fields for these Family Members

| First Name | Middle | Last Name | Suffix | Date of Birth mm/dd/yyyy | Age | Age Group | Gender | Status | Searchable | Updated? |
|------------|--------|-----------|--------|-----------------------------|-----|-----------|--|--|---|----------|
| June | | Food | ▼ | 02/13/1977 | 44 | 35 - 59 | <input type="radio"/> F <input checked="" type="radio"/> M | HOH | | |
| Line | | Food | ▼ | 06/06/1978 | 43 | 35 - 59 | <input checked="" type="radio"/> F <input type="radio"/> M | <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Permanent Inactive <input type="radio"/> Deceased <input type="radio"/> Delete | <input type="radio"/> Yes <input checked="" type="radio"/> No | |
| Curve | | Food | ▼ | 01/01/2011 | 10 | 5 - 17 | <input type="radio"/> F <input checked="" type="radio"/> M | <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Permanent Inactive <input type="radio"/> Deceased <input type="radio"/> Delete | | |

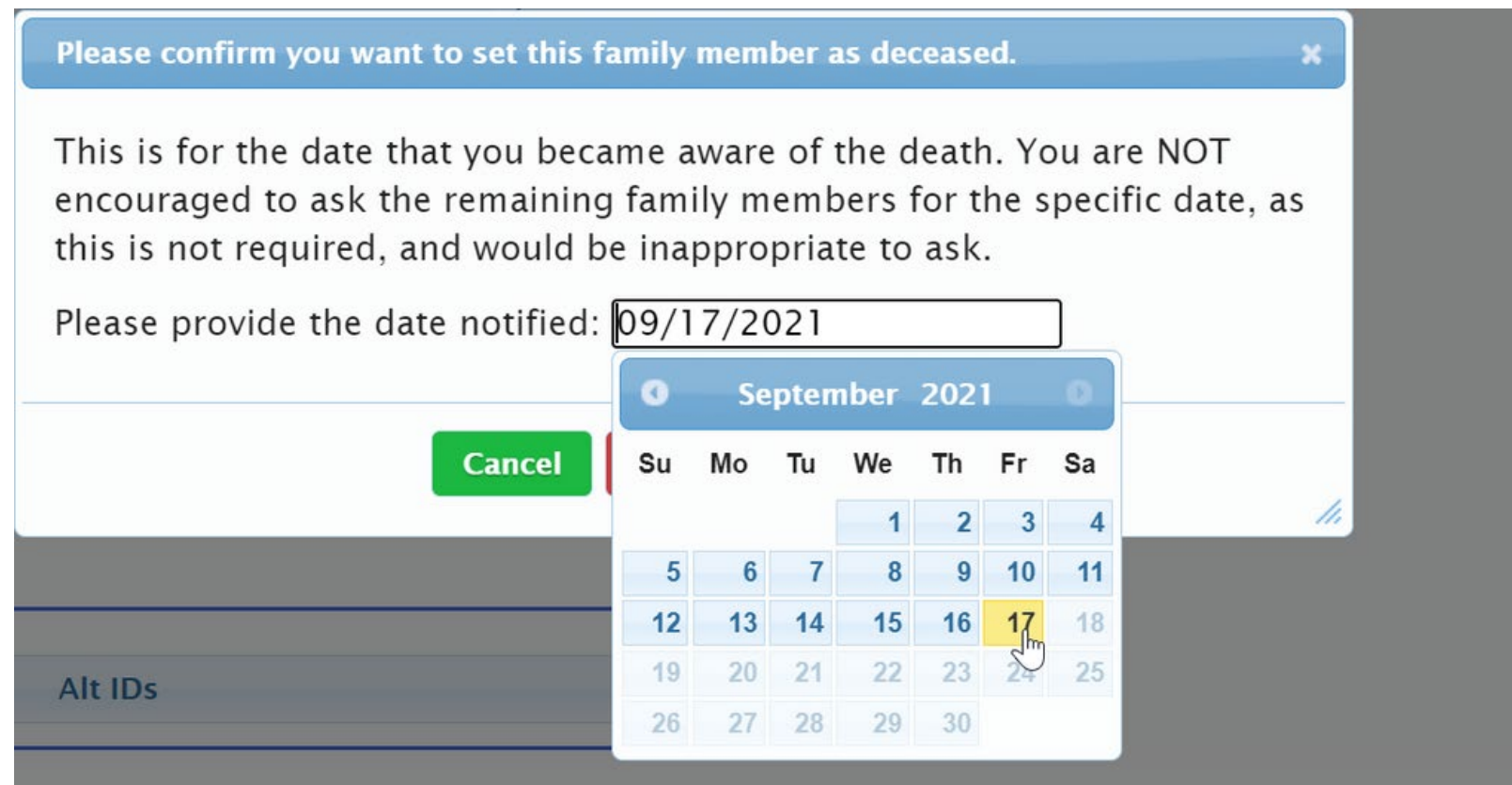
3 Mark "Deceased" in the "Status" column.



Marking household members as deceased

I'm serving June Food, and she tells me that Line Food passed away recently.

4 Select today's date (or the date you became aware of the death.)



Please confirm you want to set this family member as deceased. ✕

This is for the date that you became aware of the death. You are NOT encouraged to ask the remaining family members for the specific date, as this is not required, and would be inappropriate to ask.

Please provide the date notified: 09/17/2021

Cancel

September 2021

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | | |

Alt IDs

5 Click "Set as Deceased."



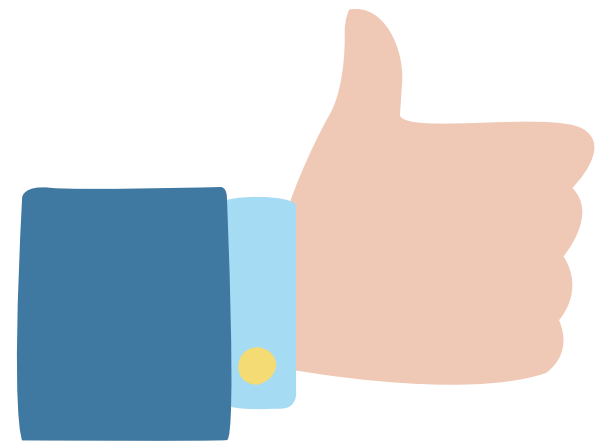
Cancel Set as Deceased

Marking household members as deceased



I'm serving June Food, and she tells me that Line Food passed away recently.

| First Name | Middle | Last Name | Suffix | Date of Birth mm/dd/yyyy | Age | Age Group | Gender | Identification | Status |
|------------|--------|-----------|--------|-----------------------------|-----|-----------|---|--|--|
| June | | Food | | 02/13/1977 | 44 | 35 - 59 | <input type="radio"/> F <input checked="" type="radio"/> M <input type="radio"/> O | <input checked="" type="radio"/> Needed <input type="radio"/> Verified | |
| Curve | | Food | | 01/01/2011 | 10 | 5 - 17 | <input type="radio"/> F <input checked="" type="radio"/> M <input type="radio"/> O | <input checked="" type="radio"/> Needed <input type="radio"/> Verified | <input checked="" type="radio"/> Active <input type="radio"/> Inactive |




LOOKS GOOD



Marking household members as deceased

What if the head of household passes away?

-  In a single-person household, it doesn't hurt anything to leave that household in the system: you just won't click on their name to serve them in the future.

However, if you do want to indicate this somehow, there is a way to mark them as deceased.



NOTE: you will no longer be able to look up their record by searching for them after you do this.

Marking household members as deceased

What if the head of household passes away?

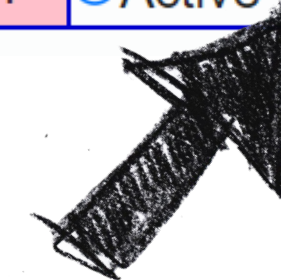
1 Click on the "Family Members" tab at the top.



2 Scroll down to the bottom. You'll see that the only status options for the HOH in this single-person household are "Active" and "Deceased."

| First Name | Middle | Last Name | Suffix | Date of Birth mm/dd/yyyy | Age | Age Group | Gender | Status | Updated? |
|------------|--------|-----------|--------|-----------------------------|-----|-----------|---|--|----------|
| Kay | | Food | ▼ | | 40 | 35 - 59 | <input type="radio"/> F <input type="radio"/> M | <input checked="" type="radio"/> Active <input type="radio"/> Deceased | |

3 Mark "Deceased" in the "Status" column.

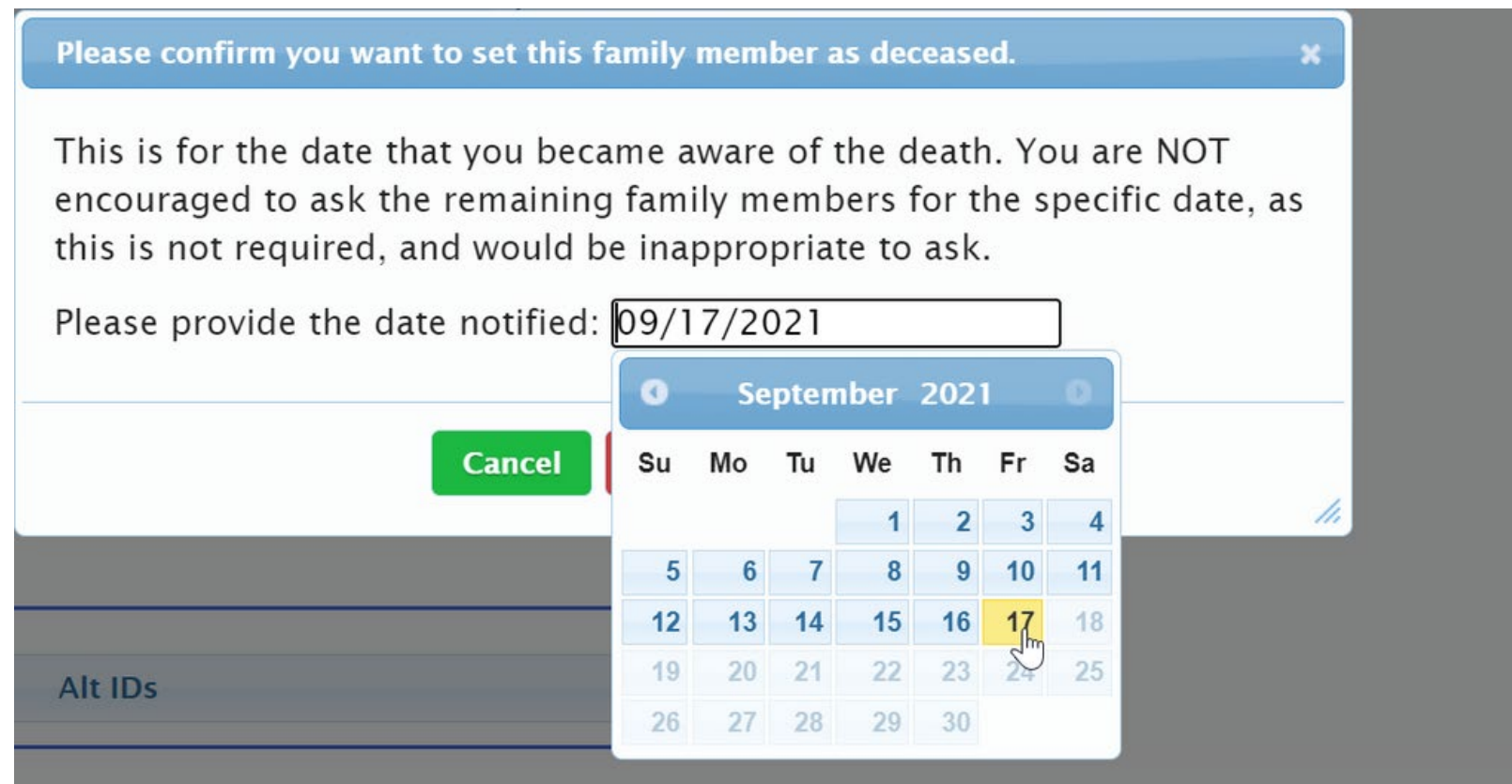


Marking household members as deceased

What if the head of household passes away?

4

Select today's date (or the date you became aware of the death.)



Please confirm you want to set this family member as deceased.

This is for the date that you became aware of the death. You are NOT encouraged to ask the remaining family members for the specific date, as this is not required, and would be inappropriate to ask.

Please provide the date notified:

| September 2021 | | | | | | |
|----------------|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | | |

Alt IDs

5

Click "Set as Deceased."



Marking household members as deceased

What if the head of household passes away in a MULTIPLE-PERSON household?

1 Click on the "Family Members " tab at the top.



2 Click on "Promote Head of Household."



This appears in the middle of the page for most screen sizes.



Marking household members as deceased



What if the head of household passes away in a MULTIPLE-PERSON household?

3 You'll have the option to promote anyone over the age of 17 to the new Head of Household. This is the person whose name the household will be under. Just select the button in the "Promote" column next to the new HOH, then click "Promote" at the bottom.

Cancel

Promote Head of Household

| First Name | Middle | Last Name | Age | Promote |
|------------|--------|-----------|-----|--|
| Test | | Food | 81 | Current |
| Nncy | J | Food | 37 | <input checked="" type="radio"/> Promote |
| George | | Georges | 31 | <input type="radio"/> Promote |
| Susan | | Food | 11 | Too Young |
| Joe | | Joe | 0 | Too Young |

Promote



Marking household members as deceased



What if the head of household passes away in a MULTIPLE-PERSON household?

4 Now you can see that the household is under **Nncy**, and there's a note telling you when the HoH was changed.

Food, Nncy J

| | | | |
|------|-------|--------|--------|
| LAST | FIRST | MIDDLE | SUFFIX |
| Food | Nncy | J | ▼ |

Homeless

Home Address

STREET ADDRESS

123 FOODIE RD

| | | | | | | | |
|-------------|---|----------|---|--------|---|---------|---|
| Family Size | 5 | Children | 2 | Adults | 2 | Seniors | 1 |
|-------------|---|----------|---|--------|---|---------|---|

Family Notes

9/17/2021 - Head of Household changed from Test Food to Nncy Food.

5 You can go back to the Family Members tab and mark **Test Food** as "deceased," since he's just a regular household member now.

Changing Household Size - a note




If you change household size AFTER marking a client as served, you need an extra step to make sure it shows up correctly in your stats.

Example: I'm serving **Agua Food**. I mark him as served, and then he tells me that they have a new child.

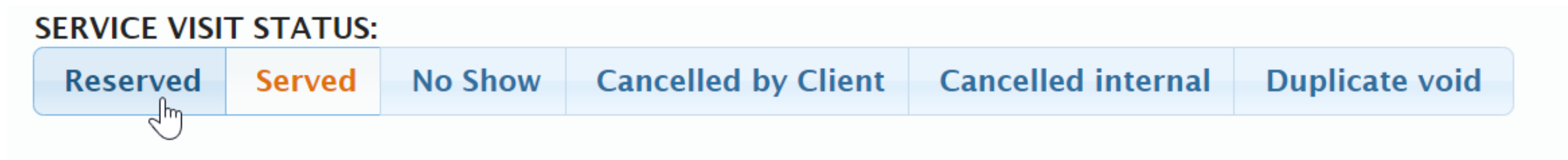
I go back into his record to add a child, but I notice that his service record on my list for that day still includes 3 adults and 0 kids. What do I do?



| Service Visit # | Name | Address | City, State | County | Zip | Kids, Adults, Total | Visit Status | Time | Signed | New? | Notes |
|-----------------|------------|--------------|----------------|--------|-------|---------------------|--|----------|--------------|------------|-------|
| 31941096 | Food, Agua | 6 Water Road | BINGHAMTON, NY | BROOME | 13901 | 0 + 3 = 3 | Served  | 06:00 AM | Not Required | New Family | |

Changing Household Size - a note

➤ Go back into the client's record. Switch their "Service Visit Status" to "Reserved," and then back to "Served."



Now when you return to the Service Visit List and refresh the page, you're all set!



| |
|------------------------------------|
| Kids, Adults, Total |
| 1 + 3 = 4 |


Using the proxy box

- Anyone listed as proxy can sign the TEFAP attestation - just select them from the dropdown menu!
- Include phone numbers, in case you need to contact them!
- NOTE: the proxy box is visible to users at **any agency**, so they may be a proxy for the client at another agency and still show up under your agency as well

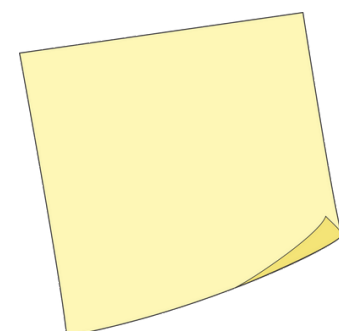
| | | | | | | | |
|-------------|---|----------|---|--------|---|---------|---|
| Family Size | 4 | Children | 1 | Adults | 0 | Seniors | 3 |
|-------------|---|----------|---|--------|---|---------|---|

Family Notes

Proxy

 Sue Food - (000)000-0000

Family Notes



Only visible to your agency
Can't run reports on it

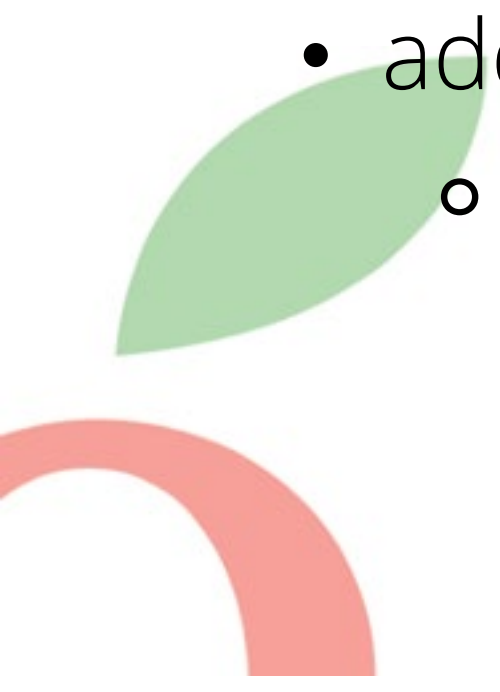
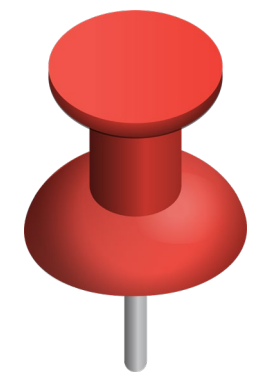
What does your agency use this section for?



Family Notes

Possible things to include:

- dietary restrictions/preferences
 - ex: prefers lactose-free items; vegan; severe nut allergy; does not have access to a stove
- reminders about questions to ask on future visits
 - ex: needs to bring back signed TEFAP attestation (note from 09/03/2021); not sure if they gave the right DOB or address
- address changes
 - ex: moved from 10 Food Dr in Binghamton on 9/3/2021; address changed from 1 Farm Ave in Conklin on 10/1/2021



Family Notes

Possible things to include: (Part 2)

- general information about family
 - ex: grandkids stay with them for a weekend every month - love extra fruit when available
- extra assistance needed
 - ex: needs help bringing food to car; primary language is Spanish

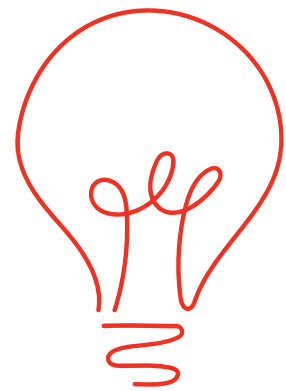


Tips and tricks:

- > include dates!
- > keep comments appropriate and respectful



Address Formatting





TIP: If you enter an address with normal capitalization, and then see it listed in your Service Visit List in ALL CAPS, that means it has been geocoded correctly by the system.




If this does not happen, check to make sure that there aren't spaces where there shouldn't be, and that the formatting matches my suggestions below. If it still isn't working, don't worry about it - sometimes the system messes up!

Address Formatting

 Rd., Ln., Ave., Dr.

 Road, Lane, Avenue, Drive

 Rd, Ln, Ave, Dr

 100 St Rt 10

 100 Route 10

 100 State Route 10

 10 East 15th St

 10 E Fifteenth St

 10 E 15th St

Poll time!







Miscellaneous Tips

This is what you want the Service Visit List page to look like at the end of the day.

[Add New Family & Visit](#)

Service Visit list for Monday 09/13/2021 , Pantry

[SHOW Notes](#)

| Service Visit # | Name | Address | City, State | County | Zip | Kids, Adults, Total | Visit Status | Time | Signed | New? | Notes |
|--------------------------|--------------|-----------------|------------------|---------|-------|---------------------|--|----------|--|------------|-------|
| 31871056 | Food, April | 88 Foodie Way | CORNING, NY | STEUBEN | 14830 | 0 + 2 = 2 | Served  | 04:00 PM | Not Required | New Family | |
| 31870745 | Food, Blue | 65 Foodie Way | PAINTED POST, NY | STEUBEN | 14870 | 1 + 1 = 2 | Served  | 04:17 PM |  | New Family | |
| 31870754 | Food, Brown | 170 Foodie Lane | PAINTED POST, NY | STEUBEN | 14870 | 0 + 2 = 2 | Cancelled internal | 04:17 PM |  | New Family | |
| 31870612 | Food, Cheese | 123 FOODIE DR. | ADDISON, NY | STEUBEN | 14801 | 1 + 2 = 3 | No Show | 04:08 PM | | New Family | |
| 31871102 | Food, Egg | 199 FOODIE AVE. | CORNING, NY | STEUBEN | 14830 | 0 + 3 = 3 | Cancelled internal | 04:42 PM | | New Family | |



All visits are either green, red, or yellow. For any visit still in white, click on the Service Visit # and go in and mark them as Served (or sign the e-signature if that tab is in red), Cancelled Internal, or No Show.



Each household is only listed once. For duplicates, click into one of the visits and mark it as Duplicate Void.



Miscellaneous Tips

This is what you want the Service Visit List page to look like at the end of the day.


[Add New Family & Visit](#)

Service Visit list for Monday 09/13/2021 , Pantry

[SHOW Notes](#)

| Service Visit # | Name | Address | City, State | County | Zip | Kids, Adults, Total | Visit Status | Time | Signed | New? | Notes |
|--------------------------|--------------|-----------------|------------------|---------|-------|---------------------|--|----------|--------------|------------|-------|
| 31871056 | Food, April | 88 Foodie Way | CORNING, NY | STEUBEN | 14830 | 0 + 2 = 2 | Served  | 04:00 PM | Not Required | New Family | |
| 31870745 | Food, Blue | 65 Foodie Way | PAINTED POST, NY | STEUBEN | 14870 | 1 + 1 = 2 | Served  | 04:17 PM | e | New Family | |
| 31870754 | Food, Brown | 170 Foodie Lane | PAINTED POST, NY | STEUBEN | 14870 | 0 + 2 = 2 | Cancelled internal | 04:17 PM | e | New Family | |
| 31870612 | Food, Cheese | 123 FOODIE DR. | ADDISON, NY | STEUBEN | 14801 | 1 + 2 = 3 | No Show | 04:08 PM | | New Family | |
| 31871102 | Food, Egg | 199 FOODIE AVE. | CORNING, NY | STEUBEN | 14830 | 0 + 3 = 3 | Cancelled internal | 04:42 PM | | New Family | |

✓ For all green entries, the Signed column either says "Not Required," or has an "e" for e-signature.

⚠ If it says Recheck , you marked them as Served but forgot to mark anything for How They Signed. Go back into their record and mark "Not Required" (or, sign the e-signature if the tab is red).



Miscellaneous Tips

This is what you want the Service Visit List page to look like at the end of the day.

[Add New Family & Visit](#)

Service Visit list for Monday 09/13/2021 , Pantry

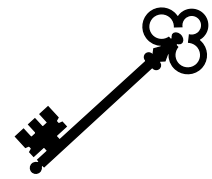
[SHOW Notes](#)

| Service Visit # | Name | Address | City, State | County | Zip | Kids, Adults, Total | Visit Status | Time | Signed | New? | Notes |
|--------------------------|--------------|-----------------|------------------|---------|-------|---------------------|--|----------|--------------|------------|-------|
| 31871056 | Food, April | 88 Foodie Way | CORNING, NY | STEUBEN | 14830 | 0 + 2 = 2 | Served  | 04:00 PM | Not Required | New Family | |
| 31870745 | Food, Blue | 65 Foodie Way | PAINTED POST, NY | STEUBEN | 14870 | 1 + 1 = 2 | Served  | 04:17 PM | e | New Family | |
| 31870754 | Food, Brown | 170 Foodie Lane | PAINTED POST, NY | STEUBEN | 14870 | 0 + 2 = 2 | Cancelled internal | 04:17 PM | e | New Family | |
| 31870612 | Food, Cheese | 123 FOODIE DR. | ADDISON, NY | STEUBEN | 14801 | 1 + 2 = 3 | No Show | 04:08 PM | | New Family | |
| 31871102 | Food, Egg | 199 FOODIE AVE. | CORNING, NY | STEUBEN | 14830 | 0 + 3 = 3 | Cancelled internal | 04:42 PM | | New Family | |

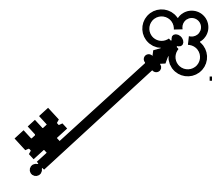
✓ For all green entries, the Signed column either says "Not Required," or has an "e" for e-signature.

⚠ If it says **Missed**, you marked "Required, NOT Signed" instead of "Not Required." Go back into their record and mark "Not required."

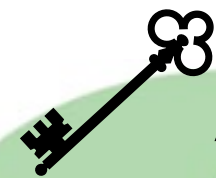
Key Takeaways



Don't type the entire last and first name when you're searching for a client. You probably won't find them, if there's any sort of misspelling! Stick with a few letters of the last name, and a first initial, in most cases.

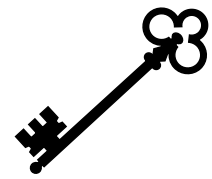


The "Family Members" tab is your friend! You can make adults searchable, make household members permanently inactive, and change the head of household if needed.

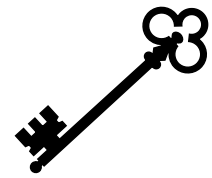


Ask for household changes BEFORE marking people as Served. It's a lot easier to change beforehand than to fix later!

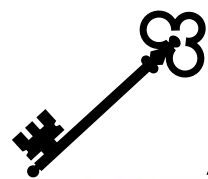
Key Takeaways



Use the Family Notes section for anything that may help your agency serve that household better in the future!



Do a quick check to see if an address is entered properly by seeing if it shows up in ALL CAPS on your Service Visit List page. Always keep an eye out for improperly entered addresses so that you can fix them!



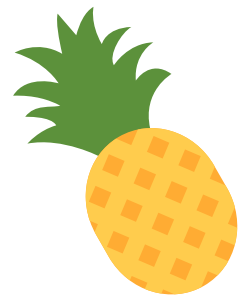
At the end of the day (or when you have down time during pantry hours), review your Service Visit List to make sure there are no visits left in white, and no "recheck" or "missing" warnings in the Signed column.



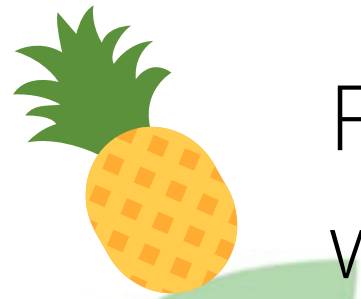
Practice, Practice, Practice!



To make sure you understand what we've discussed, here are some ways to try things out by yourself:



Get creative when you're searching for a client you know is in the system. Try putting in just the first two letters of their last name, then a comma, then their first initial. Does it bring up their name?



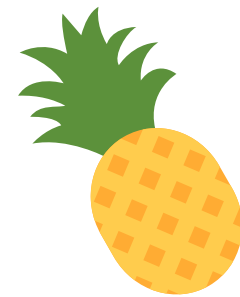
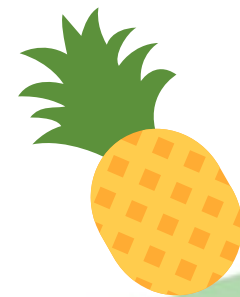
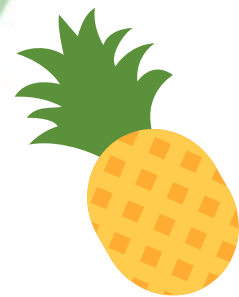
For a household with multiple adults, make them searchable. Do you see where you could mark them "permanent inactive" or "delete"? How about how to promote a member to head of household?



Practice, Practice, Practice!



To make sure you understand what we've discussed, here are some ways to try things out by yourself:

-  When you serve a client and think, "Maybe I should add that to their family notes so others will know," DO IT!
-  Whenever you serve a client, check to see if their address is listed in the proper format for FreshTrak. If not, fix it!
-  Practice using "Cancelled Internal" and other service visit statuses. Don't let any visits stay white ("Reserved").

Final poll time!