



# PantryTrak

## Frequently Asked Questions





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**Q: What is PantryTrak?**

A: PantryTrak is a client record management system that was developed by Mid-Ohio Foodbank in 2009. The goal is to reduce paperwork, simplify the registration process, and collect concrete data that can be reported back to the community and key stakeholders.

**Q: Can multiple people use PantryTrak at the same time?**

A: Yes! You can be on as many devices as you need to be at the same time. If you are able to, have one person checking in existing families and a second person entering new families.

**Q: Why are some families already in the system when I search for them?**

A: We have launched PantryTrak at some of our Produce to People distributions. As you know, all of the families you serve are welcome to attend a pantry and as many Produce to People distributions as possible. For privacy purposes you can only see the person's service history at your pantry.

**Q: How do I look at a family's household card without creating a service record?**

A: On the home screen there is a small link for "History Lookup." Be careful, this screen looks very similar to other screens where you can create a service record. Search for a family under history lookup and click on their name to make changes without creating a service record.

**Q: Who do I call for help?**

A: Call a member of the Network Development team. Mid-Ohio Foodbank created the software and has helped us convert it for use in our network, but do not call them directly. All questions or concerns should come through GPCFB. Contact information is on the first page of the training manual.

**Q: Will PantryTrak eliminate any of my paperwork?**

A: Yes. PantryTrak is designed to eliminate the paper versions of the Monthly Sign-In Sheets, the TEFAP forms, and the household cards/intake forms. Use the e-Signature function (instructions are in the Registration Manual) to have your families electronically sign a TEFAP form at each distribution. While signing a TEFAP form at each distribution is a departure from the old process, it combines the requirement for a TEFAP signature and a client signature at each distribution.

**Q: Can I complete my CSFP paperwork using PantryTrak?**

A: Not yet. Mid-Ohio Food Bank is planning to add CSFP functionality to PantryTrak in 2017. At that time, we will test the system and request approval from Hunger Free PA (our state sponsor for CSFP) to use PantryTrak for all CSFP requirements. For now, continue to use the paper versions of CSFP paperwork.

**Q: What if our internet is down?**

A: We suggest keeping some household cards or intake forms, monthly sign-in sheets, and paper TEFAP forms on hand just in case of an internet outage. Have your families register as they normally would and put them into PantryTrak later on.

**Q: I don't have internet access. What steps do I need to take to use PantryTrak?**

A: GPCFB will not provide internet access - that is the responsibility of the pantry. If your pantry is in a church and there is wireless available but it doesn't reach your registration space, our IT team can help you find the right technology to make PantryTrak a reality. Ask your coordinator for assistance.

**Q: Do I need to download PantryTrak?**

A: No. PantryTrak is a cloud-based system, meaning any device with internet access can log on to PantryTrak, including You might need to enable JavaScript before PantryTrak will work.

**Q: There are two identical records when I search for a family. Can one be deleted?**

A: No record can be deleted. However, GPCFB is able to merge duplicate records together. To start that process, click the "Merge" boxes on the right hand side of the screen for both records. The merge will not happen automatically. Keep the boxes checked until we have the opportunity to review the duplicates and merge them into one. Continue using only one of the records to serve the family.

**Q: I want to pull a list of all of my families out of PantryTrak. How do I do that?**

A: The Analysis and Learning Center has a variety of reports you can use to pull all kinds of information. Halfway down the page there is a report called "List of Families." You can view that report online or download it into Microsoft Excel or Google Sheets.

**Q: The record that came up for the family I'm searching for is incomplete. Should I edit this record or make a new record?**

A: If a family is in the system from Produce to People, chances are there will be missing information in the household card. If you are sure the family you're viewing is the same family that you're trying to enter, feel free to update the household card to show accurate information.

**Q: Can we use this system to "catch" people who use more than one pantry?**

A: PantryTrak was not built for this purpose, but rather to assist in registration and data collection

**Q: What is the e-Signature tab for?**

A: Agencies can use the e-Signature tab to eliminate the paper version of the Monthly Sign-In Sheet and the paper version of the TEFAP form. Have the head of household, proxy or adult household member complete the e-Signature process at every distribution. The e-Signature function replaces the TEFAP and the Monthly Sign-In Sheet for GPCFB and the PA Department of Agriculture.

**Q: How do I create historical service records?**

A: The easiest way to create historical services records is to visit the “Service History” tab after you’ve entered the family. Click on the tab next to e-Signature that says “Served Last On.” Scroll to the bottom of the screen and click “Add Historical Service Records.” Enter past service records into those fields before clicking “Add.”

**Q: I accidentally registered the same person twice.**

A: Go to the Home screen and scroll down to the Service Visit Logs. Pick the day where the duplication occurred. Make sure one of the duplicated listings is showing up as “Served” (the row will be highlighted green). Click on the Service Visit # for the second record and change the Service Visit Status from Served to “Duplicate Void.” When you return to the Service Visit List and refresh your browser, the duplicate record will be pink and will say “Duplicate Void” in the service status. Both entries will continue to show up in your Service Visit List, but the duplicate void record will not populate in your statistics for that distribution.

**Q: I accidentally registered a person that has not come to my pantry. What do I do?**

A: Follow the same instructions above except select ‘Cancelled Internal” instead of “Duplicate Void.” This essentially means you made a mistake internally and don’t want that person to show up on your statistics. Like above, the record will show up on your Service Visit List, but the line should be highlighted pink. You may need to refresh or reload the page to see the change.

**Q: What should I do if I find an entry with the same name when I’m searching?**

A: If you are not 100% sure the entry you’ve found is the one you are looking for, err on the side of caution and create a new record. If you know for sure it’s the same family (i.e. they lived at the old address and it just needs to be updated, or one of their kids has gone to college and moved out of the house) you can click on their name and update the record.

**Q: My screen did not transition to the household card after adding a new family.**

A: If you added historical service records or used a date that is NOT today’s date, the system will not take you immediately to the household card. The person you entered is in the system, which you can see by refreshing or reloading the service log page.

**Q: How do I add a new family member?**

A: You can add a new family member in two places. Scroll halfway down the main screen. Under the section that shows you family member information there is a yellow button that says “Add New Family Member.” Click that button to continue. You can also enter new family members on the “Family Members” tab.

**Q: If a family member moves out, how do I delete them from the card?**

A: Go to the “Family Members” tab at the top of the screen. In the table listing the family members, you will see a column for “Status.” In this area, you can change the status of each individual. If you select “delete,” the family member will remain on the family members tab but will no longer appear on the main household screen and will not be calculated into the family’s statistics. If they move back into the home, you can simply follow these instructions and select “Active” to add them again.

**Q: What is the difference between inactive and delete on the family members tab?**

A: Making a family member inactive will prevent them from being calculated in your monthly statistics, but the family member will remain on the main household screen. Deleting a family member ensures they are not calculated in your monthly statistics, and they are taken off of the main household screen. In both circumstances, the family member can still be found on the Family Members tab. You can make inactive or deleted individuals active again if needed.

**Q: I forgot to change the service visit status to served for multiple families. Is there an easier way to update that information than by clicking on each family’s service number?**

A: Yes. At the top of the service log screen (right above the search bar) there is an option for “Expanded.” Clicking on that will create a drop-down for each family that allows you to change their dates of birth, gender, and service visit status. To edit additional information, like military status or SNAP benefits, you will need to click on the service visit number and go into the family’s household card.

**Q: What is the “Quick Add” button?**

A: Quick Add is another place where you can search for families on registration day. We recommend using the Food Pantry button to register families because it allows you to keep a list of the families you have already served. Quick Add will allow you to serve the family, but you will not see a growing list to help you double check your work.

**Q: How do I keep track of emergency food orders?**

A: You should be recording emergency food families in PantryTrak, even if they do not come on distribution day. If you distribute a significant amount of emergency food and want to track it separately, call your Agency Network Coordinator. We can set up a new event specifically for the distribution of emergency food.

**Q: My pantry distributes by appointment. Can PantryTrak make appointments?**

**A: Yes!** To make an appointment, follow the registration instructions until you are in the family’s household card. Select the date and time of the reservation/ ap-

The top screenshot shows the appointment scheduling interface. The 'Service Provided' is 'Pantry - Choice - 3 day'. The date is set to 06/08/2016 at 10:00 AM. A calendar for June 2016 is displayed, with the 1st highlighted. Below the calendar is a table of family members:

First Name	Middle	Last Name	Suffix	Date of Birth	Age	Identification	Status
Eliza		Kuhn		04/01/1988	28	<input type="radio"/> Verified	<input type="radio"/> Active <input type="radio"/> Inactive
Dolores		Brown		01/01/1927	89	<input type="radio"/> Verified	<input type="radio"/> Active <input type="radio"/> Inactive
Laura		Officer		02/01/2009	7	<input type="radio"/> Verified	<input type="radio"/> Active <input type="radio"/> Inactive
Gerry		Kuhn		01/02/2009	7	<input type="radio"/> Verified	<input type="radio"/> Active <input type="radio"/> Inactive

The bottom screenshot shows the same interface with the time selection dropdown menu open, showing times from 07:00 AM to 11:30 AM. The 'Required, NOT Signed' status is selected under 'HOW DID THEY SIGN?'. The 'Reserved' status is selected under 'SERVICE VISIT STATUS?'. An 'Add Family Member' button is visible in the bottom right corner.

Instead of changing the status to “Signed Paper Form” and “Served” like you would if the family was in front of you, you will click “Required, Not Signed” and “Reserved.”

When the family comes in for their appointment, go to the Home Screen and scroll down to the Service Visit Logs. Click on the yellow “Pantry” button in the middle of the screen and you will see the reservation in the Visit Log.

Click on the Service Visit # and change the “Required, Not Signed” to “Signed Paper Form,” and “Reserved” to “Served.”

**Q: How can I quickly see when a family was last served at my pantry?**

**A:** There are several ways to view service history. See below.

1. To see the most recent visit date, search for the household in any field. The last service date will populate with a shopping cart next to it in the “Last Served” column.
2. To view all service history, go to History Lookup on the Home Screen and search for the household. Click on the name, and click on the “Service History” tab.
3. Search for a household and hover over the information button to see the full service history at your pantry.