PantryTrak
Training Manual

System Overview

PantryTrak is an electronic client record management system that was designed by Mid-Ohio Foodbank in 2009, specifically for use at food pantries. It is a cloud-based system, which means you can access PantryTrak from any device that has internet access. PantryTrak simplifies the registration system at pantries and provides automated, detailed reporting features. This system will eventually replace paper forms.

PantryTrak generates an unduplicated count of families/individuals in any given service area, and provides real-time data that will inform your pantry, GPCFB, volunteers, donors and other community stakeholders.

PantryTrak Training Manual
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Important Note:

Please do not contact Mid-Ohio Foodbank for assistance. Call any member of the Network Development team at GPCFB and we will be happy to help.

Call 412-460-3663

Eliza Kuhn: extension 408

Brian Zeisloft: extension 219

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Suzanne Smith: extension 230

Charlese McKinney: extension 284

PantryTrak Login Information

https://secure.pantrytrak.com

Username:

Password:

Logging In

Open your internet browser (Google Chrome, Internet Explorer, Safari, etc.), and type https://secure.pantrytrak.com in the URL line.

Click "Member Login," and enter your User Name and Password (see page 3). Click LOGIN to continue to the next screen.

Welcome to PantryTrak.com - Food Pantry management tools

Being developed by Pantry Managers, for Pantry Managers....

Please enter your User Name and Password -

User Name

2222-1

For users with authorized access to the Demo system, please use the following link - demo.pantrytrak.com

Password

••••••

System Notes:

LOGIN

Feel free to use any browser you would like... some good choices of secure/fast browsers are - **Firefox**, **Chrome**, **Safari**, etc. You will need to make sure that Javascript is enabled in your browser settings. If you do experience problems with the site using InternetExplorer, you may want to give Firefox or Chrome a try. Both are free and easy to install.

WARNING!!!! UNAUTHORIZED ACCESS PROHIBITED
You must have authorized permission to access this area. All actions are monitored, recorded, and reported.

PantryTrak is being developed and supported through the leadership of Mid-Ohio Foodbank, for more information please contact Mark Mollenkopf, mmollenkopf at midohiofoodbank.org, or call 614-317-9450.

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VERIFIED & SECURED
VERIFY SECURITY

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Home Screen

You will be directed to the home screen after logging in. This screen is your portal to PantryTrak—you can add new families, conduct registration at your distribution, and generate statistics reports from this screen. Click "HOME" at any time to return to this screen.

West Hills Food Pantry
User: Sandy Hershberger - Pantry Director

HOME   **QUICK ADD**   **LOGOUT**

Main Menu	
Manager Tools	Manage Alt ID Types eSignature Audit
Service History Lookup	(to add NEW records, use the correct date from the list below, or use Quick Add) History Lookup
REPORTS	- Agency Stats Report ** NEW ** Analysis & Learning Center Main Pantry Report Include Produce
HELP DESK	Help Desk & Knowledge Base (ask for Help and find Answers about PantryTrak) PT Help Desk

Serve Families on 06/01/2016

Pantry

Jump to day

Select Event: Pantry ▼
Choose a Date: 06/01/2016

Submit

Service Log

Current	By Year

Pantry☑   Holiday Baskets☑   KD-Turkey Fund☑

Event	Date	# Reservations	
Pantry	05/31/2016	117	Check-in
Pantry	05/24/2016	135	Check-in
Pantry	05/17/2016	153	Check-in
Pantry	05/10/2016	128	Check-in
Pantry	05/03/2016	133	Check-in
Pantry	04/26/2016	126	Check-in
Pantry	04/24/2016	4	Check-in
Pantry	04/19/2016	143	Check-in
Pantry	04/12/2016	132	Check-in
Pantry	04/05/2016	129	Check-in

Service Snapshot

	Visit Records	Served
Today	0	0
This Week	117	117
This Month	0	0
This Year	2974	2850

click chart below for NEW report

Served Records in PantryTrak between January 1, 2012 and April 10, 2014

Click and drag in the plot area to zoom in

Complete History
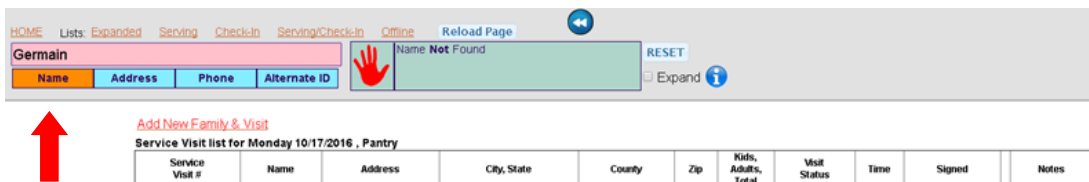
Searching for Records

Some of your families might already have a record in PantryTrak. Remember, all families are permitted to attend Produce to People distributions in addition to attending a pantry so they could be in the system for that reason.

NOTE: It is important to search for each family before adding a new record to avoid entering the same family into the system more than once.

Scroll halfway down the screen until you reach this point:

To make entering your families as easy as possible, click the yellow "Pantry" button to start searching for families. All records will pre-populate with today's date to start, but you can change the date back to the family's last service date later if you want your records to be accurate. Once you are on the next screen, type in the last name of the family for which you are searching. If the family is not in PantryTrak, no records will appear and the search bar will be highlighted pink. If this occurs, proceed to page 6 to add a new household.

If there is a record for that name in PantryTrak, it will appear in a blue table below the search bar.
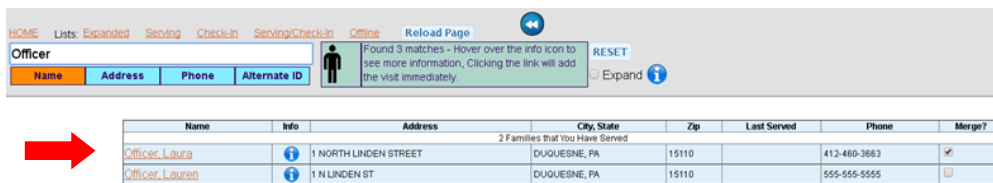
If the family you are searching for appears, hover over the 🛈 button to view basic household information. Confirm that the information on the screen is the same as the family for which you are searching by comparing the address, phone number, etc.

When you are certain you have found the family you are looking for, click on the name and proceed to page 8.

Entering a New Household

If the family you are searching for is not found, enter their household information into PantryTrak by clicking the "ADD NEW Family & Reservation" link.

Enter information about the head of household, and other information displayed on the screen.

NOTE: when adding a new family, your information will not be saved until you complete the last step.

If possible, enter date of birth. Ages will automatically update every year. If you do not have date of birth, enter the individual's age and add date of birth later.

Enter the number of people in each age group, **including the head of household.** You must put a number in each box - enter 0 if there are no people in the household in that age group.

Check your work for accuracy, and click NEXT to continue.

Entering a New Household, continued

Enter name, date of birth and gender for each additional household member. PantryTrak automatically enters the last name of the head of household for each family member. If another household member has a different last name, you can change it manually.

PantryTrak will allow you to enter previous service dates to help you track when this family was served at your pantry. While this practice is useful, it is not required. If you want to use this function, proceed to page five of the Frequently Asked Questions handout. If you do not want to create historical service records, click "ADD" to complete the process.

Once you have successfully added a new family, the confirmation screen below will appear briefly and you will automatically be directed to the family's new household card. This family is now ready for registration.

If you get stuck on this page, please refer to the Frequently Asked Questions handout for guidance.

Main Screen and Entering Additional Information

The main tab is the equivalent of the household card. From this screen you have access to all information about this households service history at your pantry.

All agencies are required to report three additional demographics each month. You are asked to track whether families receive SNAP benefits, whether any individuals in the household have a legal disability, and whether individuals in the household are veterans.

Enter this information in the appropriate boxes (see image on next page).

Main Screen and Entering Additional Information, continued.

The main tab is the equivalent of the household card. From this screen you have access to all information about this households service history at your pantry.

All agencies are required to report three additional demographics each month. You are asked to track whether families receive SNAP benefits, whether any individuals in the household have a legal disability, and whether individuals in the household are veterans.

Enter this information in the appropriate boxes (see below).

Remember, you have created a service record using today's date. If you want to change the date back to this family's last visit to your pantry to keep your records as accurate as possible, you can change the date field now.

If you changed the date back, be sure to also change the service visits status at the bottom of the screen. The default is RESERVED, and you should select SERVED. This will ensure that this family shows up in your statistics reports. You should also select SIGNED PAPER FORM to notate that there is a physical signature on one of your monthly-sign in sheets for this visit.

Updating Additional Information

If you forgot to add a family member initially, or added too many family members, don't worry. You can edit the household card at any time.

Adding a Family Member

There are two ways to add another family member to the household card. Click the yellow "Add Family Member" box under the family member table, or click on the "Family Members" tab at the top of the screen. Hit refresh to view your changes.

Removing a Family Member

You cannot completely remove a family member, but you can remove them from the household card. Go to the "Family Members" tab, and click the "Delete" option in the box to the right of the individual's name and birth date. The person will continue to show up on the Family Members tab as a record of past service, but will no longer appear on the Main tab of the household card. You can always make the individual active again if they move back into the home.

Note: If you select "Inactive" the family member will continue to appear on the main screen of the household card, but they will not be included in your statistics. Each agency can decide whether to use inactive or delete, but we recommend delete to keep your records as clean and as organized as possible.

Updating Individual Information (race, ethnicity, language of origin, etc.)

If you need to update information for a particular household member, click the "Family Members" tab to edit. Scroll down to the table and select the red link "Show Additional Information Fields."

Adding Historical Service Records

Go to the "Service History" tab. Click on "Add Historical Service Records" and enter all of the dates the family received food at your pantry. You can go back as far as you would like. PantryTrak will automatically create service records for these dates.

Once you have updated all of this family's information, you can CLOSE WINDOW (at the top and bottom of the screen). Refresh the next screen to see your work and check for accuracy.

Registration

This manual is designed to assist agencies in entering new families. When you are ready to register families at the point of service, please refer to the Registration Guide for complete instructions.