CAFB ImpactTracker

cafbtanf.charitytracker.net

QUICKSTART

My Network Information

To log into **my** network, go to:

https://cafbtanf.charitytracker.net

Your Network Administrator is **Karla Cantu**, she can be contacted by email at kcantu@austinfoodbank.org or at the following phone number: **512-282-2111 X 206**. You can also send a message to the network administrator via the "Contact Admin" button located in the upper right corner.

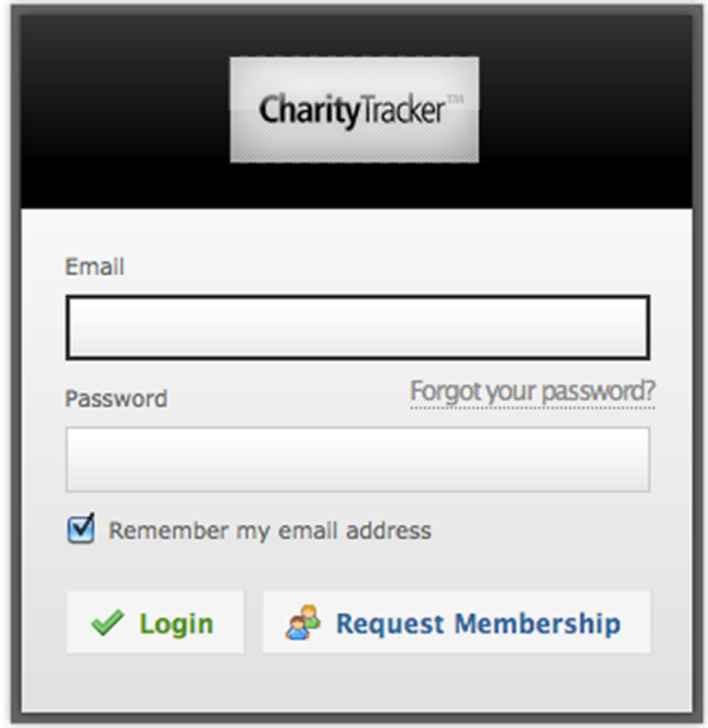
Help!

Sometimes using software can be intimidating. That's why we made it easy for you to learn and get help should you need it. We have a whole library of learning resources including Frequently Answered Questions, Video Tutorials, and an Online Learning Center. You can find these resources by going to **www.charitytracker.com/learningcenter**

You can also visit the Online Learning Center from inside CharityTracker by clicking the help button in the upper right corner.

If you'd prefer, you can shoot us an email at support@charitytracker.com and, believe it or not, you can reach us by phone by calling us toll free at: 888.764.0633. Ask for Kyle or Greg.

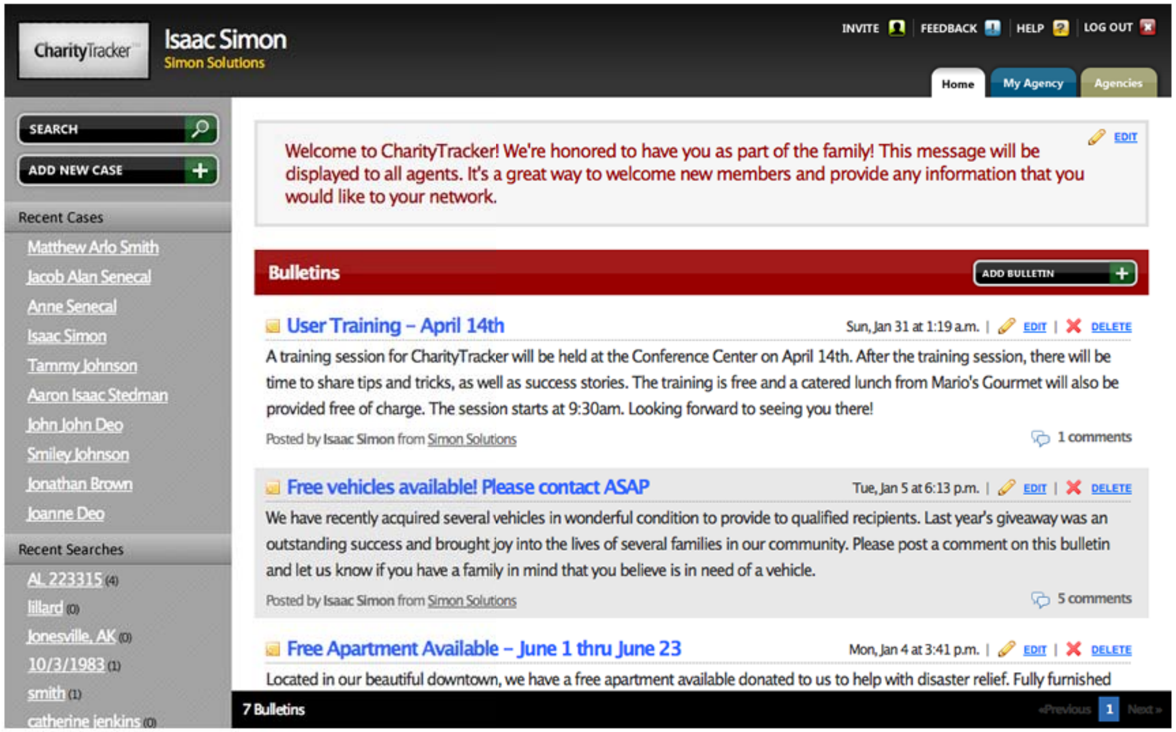
Let us know your comments, suggestions and testimonials with the feedback button found in the upper right corner.



Login Screen

How do I log in?
You will receive an email containing your login information with a link to https://cafbtanf.charitytracker.net to log in to your CAFB Impact Tracker account.

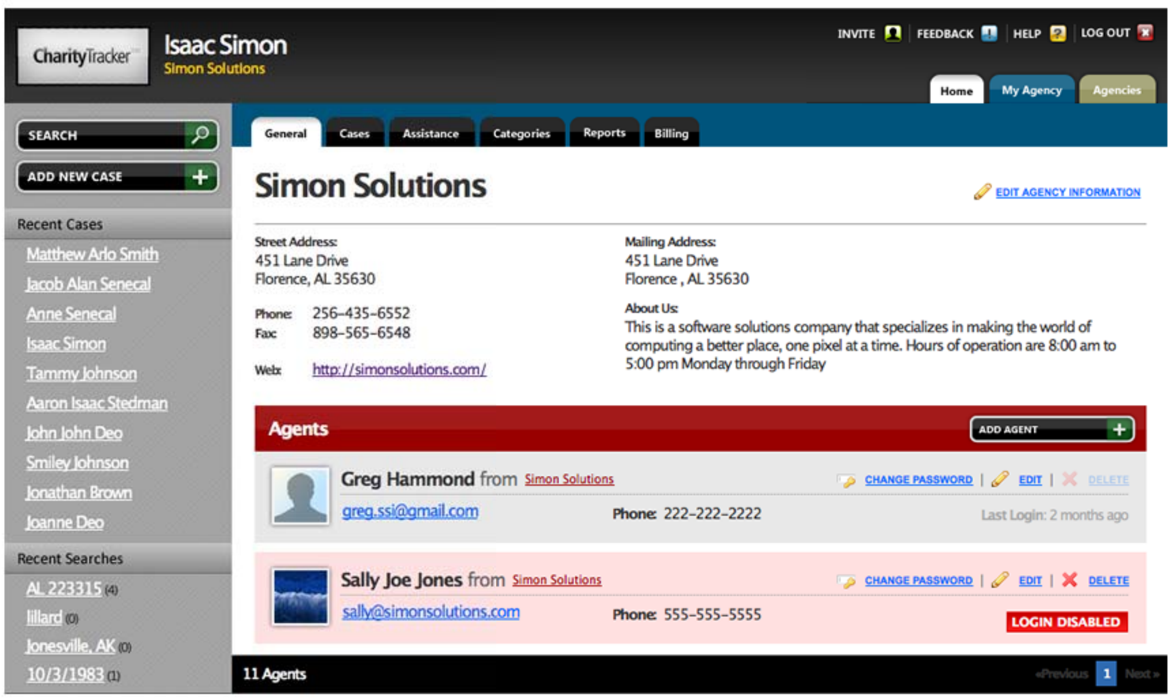
I forgot my password, how do I get it back?
On the login screen, there's a "Forgot Your Password?" link you can click to setup a new password.



Home Tab

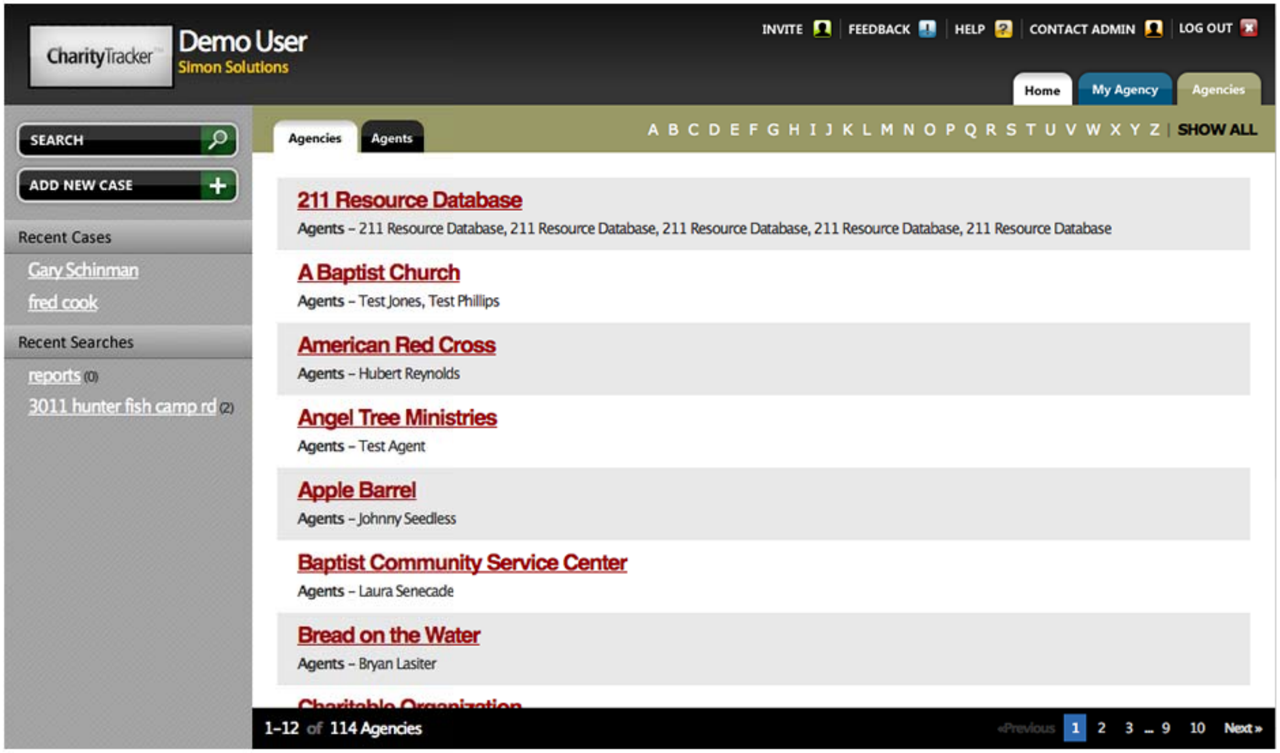
With Bulletins, everyone in your CAFB Impact Tracker network (CharityTracker) can be notified via email about anything from community events, to a listing of temporary resources and services that are available within the community. To post a message on the com ADD BULLETIN board click

Click the button to reply to a bulletin.



My Agency Tab

The My Agency tab is the one-stop place for any information on your agency. To edit the information for your agency click the EDIT AGENCY INFORMATION link found under the My Agency tab. We encourage you to update your "About Us" section to include your agency's contact information, hours of operation, services provided, etc. Also under the My Agency tab you can view a list of all cases and assistance records you've contributed to the community database, and customize assistance categories to meet your agency's needs. You'll also find the Reports section here where you go to generate reports. Choose from four types of reports -- Assistance, Cases, Categories, or Demographics report.



Agencies Tab

This tab is a listing of all the agencies in your CharityTracker network. Agencies are sorted alphabetically. Pick the first letter of the name or click "SHOW ALL" to see all participating agencies and agents. You can toggle between viewing agencies and agents.

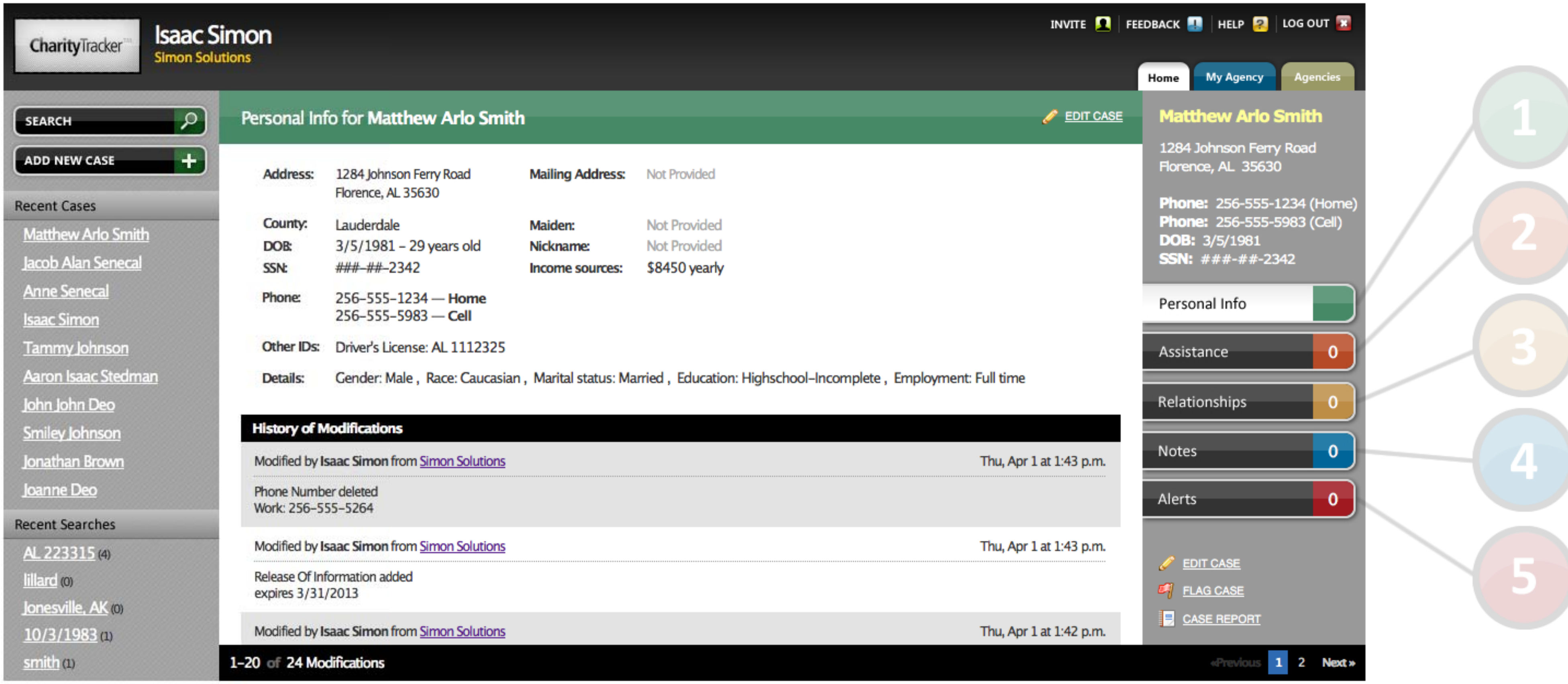
Search

Use the Search feature to find out if a case is already in the system before adding a new case. The Search button is located on left side of the screen. Type all or part of the name that you are looking for in the search bar and then click "Search". The search results will be displayed with the closest matches at the top of the list. The Advanced Search feature allows you to narrow down your search by other criteria - address, city, state, date of birth, etc.

Add New Case

Click the "Add New Case" button to add a case to the system. On the Add Case dialog box that appears enter an individual's identifying information, income & employment, and demographic information. Click the "Add" button when you are finished.

Note: In accordance with the CharityTracker Terms of Service, a signed Release of Information form is required to enter any basic identifying client information. Click the "Print ROI" button to print a hard-copy of the form. Be sure the client signs the ROI form and click the "Verify ROI" button.



1 The **Personal Info** tab gives you an overview of personal identifying information for a case. If you need to make a change to a case's personal information, you can click the "EDIT CASE" link. You will see all changes made to the case displayed in the "History of Modifications" list.

2 The **Assistance** tab allows you to view all past assistance records and add new ones to a case. Click the "Add Assistance" button, enter a value, choose a category, and then click the "Add" button.

3 The **Relationships** tab allows you to keep track of other cases that are related to the individual you're looking at. Simply click the "Add Relationship" button to add a relationship.

4 The **Notes** tab is where you can write notes to associate with a case. Notes are an easy way to remember important information about a case. When you are in a case, click on the Notes tab and then the "Add Note" button.

5 The **Alerts** tab is the place where you can give a heads-up to other agents in your network about a certain case. Alerts allow you to notify everyone in the network of suspicious activity, or perhaps there's a need that your agency alone cannot meet. Click the Alerts tab when you are in a case and then the "Add Alert" button.

Flag Case

The "Flag Case" button, located at the bottom right of a case, allows you to send a message to the network administrator if you notice an issue with a case. For example, you can use this feature if you notice two cases for the same individual and they need to be merged into one. The administrator will be notified of the flagged case via email.

Case Report

You can generate a printable report for a case which will include a summary of all personal info, assistance records, relationships, notes, and alerts. Do this by clicking the "Case Report" button found in the bottom right corner of a case.

Summer Family Nutrition Program (SFNP)

The Summer Family Nutrition Program (SFNP) provides free Family Food Boxes during the summer to families with children. The program's goal is to alleviate hunger and obesity in children in low-income families when National School Lunch and School Breakfast Program meals are not available in the summer. SFNP ensures children have the nutrition they need so they are ready to learn when school starts in the fall, and families have the resources and nutrition education they need to provide their children with healthy, nutritious food.

Step One - Pre-Screening

Prior to entering client information into the database a search must be done to assure that the family has not already been pre-screened at another food pantry. Click SEARCH, enter the family's address and click enter. If the address does NOT appear in the search then the family has NOT registered at another participating food pantry and you may proceed with screening. If the address DOES appear in the search than the family has already been qualified and registered for the program – Please inform the family that they can only register ONCE and must receive their benefit boxes at the agency that registered them.

Pre-screen clients using the CAFB SNFP pre-screening tool. The family is eligible if they answers YES to question #3 AND in question #6 is participating in one of the listed Federal Programs OR meets the household size/income guideline.

If they qualify have them sign both the pre-screen form and the Release of Information (ROI). You must now enter family information from the pre-screening form into this database. AGENCY will keep the signed Pre-screening form and ROI. Please note that these forms are cofindential and must be kept in a safe and secure location. All Forms will be turned over to CAFB at the completion of the program. NOTE: The number of signed Pre-screening forms and ROI should match the number of clients served as indicated in the CAFB Impact Tracker (CharityTracker) database.

Instruct the family how they will receive their SFNP benefit boxes from your agency. Distributions vary at each participating food pantry. Provide voucher with date/time of pick-up.

Step Two - Distributing the SNFP Benefit Boxes

Prior to handing boxes to a family you must assure that they have not already received their benefit boxes for the current month. Agency must do a SEARCH for the family and review the Assistance tab. If the family has not received their benefit proceed.

The SEARCH for the family will bring up the family. Click Assistance, then click on the current month assistance being provided. Once you have recorded that the assistance is being provided in the database you may give the benefit boxes to the family. Provide the family with a voucher/information of when they must return for the next benefit box.

Got a Question?

Please feel free to contact agency relations with any questions.