

HOW TO: Use a "Kit Issuance" report to Identify CSFP Clients in need of a "Notice of Action"

CSFP clients must be notified when they are Suspended (after not visiting for 2 months in a row) or added to the Waiting List (by request). This guide demonstrates how to use a "Kit Issuance" report from Link2Feed to identify clients that have become Suspended and require a Notice of Action, as well as how many clients you may enroll from your Waiting List each month.

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E C LINK2FEED	SM: St. Mary's Food Bank Alliance - Knight Center 50787-50340			
Tuesday, May 10th	My Applications			
3 4 0				
Dashboard				
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Administration	, Case Management			
	\checkmark Create client profiles and record services			
	Manage client cases and outcomes			
	 Report on demographics and usage patterns 			
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	These applications are not currently enabled on your system. V	ou can view more information on these app	lications, and learn how to add them to your system, by cli	icking on the corresp
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STEP 2: Click on "Clients" on the left side bar to drop down a list of options. Select "CSFP Kit Issuance".

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B Dashboard	📢 Unread Announcements			
	You have no unread Announcements			
Client Search		All Announcements		
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CSFP Kit Issuance				

, January 8th	For the following time period		
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EP 4: Select your	organization from the drop	-down list	
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SM: St. Mary's F	ood Bank Alliance - Knight Center 50787-	50340 ×	
EP 5: Select "All (Clients" and click "Create Li	st"	
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STEP 8: On the bottom left of your screen, a pop-up will appear. Click to open the spreadsheet.

🕂 Enable Scrolling 🖪 Copy 🔳 CSV 🕞 Print View

STEP 9: After the spreadsheet opens, highlight the "Status" column and click "sort and filter" on the top right of the screen. Then, select "sort A to Z".

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1 CSFP ID	Status	Last Name	First Name	Proxy	Status Change												
2 1055808	Inactive	Claw	Vangie	John Begay	6/20/2019												
3 1055826	Inactive	Aguirre	Nonabah	Maximilliano Aguirre	12/11/2020												
4 1055856	Active	Begay	Jennifer		1/8/2019												
5 1055875	Waiting List	Hayou	Rita	Mary Jean Hayou	9/15/2020												
6 1055905	Waiting List	White	Caroline		12/15/2020												
7 1055920	Active	Yazzie	Roselyn	Marjorie Denetchee	1/10/2019												
8 1055937	Inactive	Begay	Mike	Shirley Begay	6/20/2019												
9 1055979	Inactive	Draper	Nancy	Regina Draper	11/9/2019												
10 1056006	Inactive	Bahe	Mary Ann	Lee Bahe	7/16/2020												
11 1056017	Waiting List	Draper	James		12/15/2020												

STEP 10: A pop-up will appear. Select "Expand the selection" and then click "Sort" ?

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Cancel

Sort Warning

Microsoft Excel found data next to your selection. Since you have not selected this data, it will not be sorted.

<u>S</u>ort

What do you want to do?

Expand the selection O Continue with the current selection

STEP 11: Click the "+" symbol at the bottom left of the spreadsheet 3 times to add 3 new tabs. You are going to move your lists of Inactive, Suspended, and Wait List clients onto these tabs. You can rename the tabs for easier organization

111	Nuspended	2/1/202	Zi Nanchez Velasquez						
73	Suspended	12/1/202	1 Woulard						
60	Suspended	11/1/202	1 Rodriguez						
	State of Arizona	- SM St. Mary0	+		All Clients	Inactive	Suspended	Wait List	(+)
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STEP 12: On the original sheet, scroll down past the clients with an "Active" status and highlight the rows for all clients with an "Inactive" status. Then, right click and select "Cut". Now, click onto the "Inactive" tab and right click to select "Paste". Repeat this, moving "Suspended" clients to the "Suspended" tab and "Waiting List" clients to the "Waiting List" tab

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8071	6164671	Inactive	8/20/20	21 Goes		Ric
8072	6173349	Inactive	8/23/20	21 Pablo		
8073	6174093	Inactive	8/23/20	21 Ramire	🔏 Cut	Sa
8074	6176340	Inactive	8/23/20	21 Johnson	Copy	Ch
8075	6181770	Inactive	8/24/20	21 Swain		Pa
8076	6182677	Inactive	8/24/20	21 Thomas	Paste Options:	Ma
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8078	6200371	Inactive	8/26/20	21 Villalba		Im
8079	6201862	Inactive	8/26/20	21 Silva	Paste Special >	Ni
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8081	6221336	Inactive	9/2/20	21 Savala	mout out ogins	Jui
8082	6222920	Inactive	9/2/20	21 Gonzale	Delete	Ma
8083	4927272	Inactive	10/29/20	21 Nguyen	Clear Contents	Ba
8084	3637324	Inactive	2/15/20	22 Piper-B		Pa
8085	4843113	Inactive	10/19/20	21 Ramire	Eormat Cells	Re
8086	5365588	Inactive	8/3/20	21 Fonsec	Row Height	Ra
8087	6719620	Inactive	6/10/20	21 Simpso	Hide	W
8088	3550892	Inactive	3/21/20	22 Villa Al	Dige	Sa
8089	2629111	Inactive	3/22/20	22 Bouton	Unhide	Ph
8090	4859826	Inactive	5/6/20	22 Schaefe	er	Ro
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8093	896417	Suspended	2/1/20	22 Lopez		
8094	899881	Suspended	10/1/20	21 Titus		EII
	St.	to of Arizona	SM St Marv0	Sheet2	(A)	-
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STEP 13: Go to "Suspended" tab with your list of Suspended clients. Select the top of column C, then click the "Sort & Filter" button in the top right of the spreadsheet. Choose "Sort Oldest to Newest".

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966133 Suspended	6/1/2021	Chisum	Lee																							
999425 Suspended	6/1/2021	Hodge	Vickie																							
999428 Suspended	6/1/2021	Pereda	Hortencia																							
999467 Suspended	6/1/2021	Ohlmaier	Graciela																							
1013534 Suspended	6/1/2021	Portillo	Maria																							

STEP 14: A pop-up will appear. Select "Expand the Selection" and then click "Sort".

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STEP 15: Scroll down your list until you reach Suspension dates (column C) from within the past month. In the example below it is now June, and we are looking at clients who became suspended in May.

Note: Link2Feed automatically changes CSFP clients' status from "Active" to "Suspended" when they fail to visit for 2 consecutive months.

These clients will need to receive a Notice of Action form for "Discontinuance", meaning they no longer have a CSFP box and cheese reserved for them. If they wish to re-enroll, they can be placed back in an "Active" status if you have space on your caseload. If not, they should be placed on the Wait List until space becomes available.

1370	Suspended	4/26/2022	Oritz	R	
4321	Suspended	4/27/2022	Escobar almaraz	С	
0429	Suspended	4/29/2022	Larranga	Li	
6997	Suspended	4/29/2022	Campos	С	
3293	Suspended	5/1/2022	Xu	С	
3675	Suspended	5/1/2022	Apodaca	С	
5316	Suspended	5/1/2022	Cline	D	Clients who were Suspended in
7196	Suspended	5/1/2022	Yglecias	N	May and require a Notice of Action
0175	Suspended	5/1/2022	Leyva Velazquez	N	for "Discontinuance" in June.
0200	Suspended	5/1/2022	Vetter	Т	
0219	Suspended	5/1/2022	Villaloba	L	
1074	Suspended	5/1/2022	Treving	A	
3362	Suspended	5/1/2022	Segura Santiesteban	N	

	STEP 16: Follow	the steps below to complete a "Notice of Action" form for early have your excel pulled up or printed out and use the excel of	ch clien	t who has been Suspended
	in the past mont	i. Have your excerpaned up of printed out and use the excert	Fre	om vour Excel Spreadsheet
	HRP-1052A FORNA (2:22)	ARIZONA DEPARTMENT OF ECONOMIC SECURITY Division of Community Assistance and Development Coordinated Hunger Relief Program		
	c	COMMODITY SENIOR FOOD PROGRAM (CSFP)		
	Client Name: Client N	lame from Column "D" & "E" in your CSFP ID:		
	Date of Notice:			
	CSFP Distribution	Agency Information		Pro-Tin: Fill out this section 1
	Name:	Phone Number:		time on a form, make copies of
	Address:			that form so you don't have to
	Distribution Days and Hour	5	_	keep filling it out for each client
	Additional Details:			
	Details The Commodity Senior For older by supplementing the The monthly food package	od Program (CSFP) works to improve the health of low-income persons 60 years of age or ir diets with nutritious foods provided by the United States Department of Agriculture (USDA). contains shelf-stable items and a large block of processed American cheese.		
	We are writing to inform	you of the following:		
	Waiting List	You have been placed on a waiting list to receive CSFP benefits because the current caseload for this site is full. A representative will contact you once there is an opening.		
	Application Denial	Date of Denial: Your application has been denied for the following reason(s):		
Select "Discontinuance"	Disqualification	You will be disqualified from receiving CSFP as of:for the following reason(s):		
	N Discontinuones		ist pick-u 's "Servic	ip date can be found in the ce" tab in Link2Feed
	X Discontinuance	Our records indicate you have not picked up a CSFP box since		
		agency listed above if you have questions		
	Rights and Responsibilit	es la		
	Discontinuance: If you do and your box will be given distribution agency listed a	The date they became suspended.		
	Dual-Participation: You m benefits, as a result of dual of the food and may lead to	ay not receive a CSFP box twice in the same month. Improper use or receipt of CSFP -participation, or other program violations may lead to a claim against you to recover the value disqualifying you from CSFP.		
	Nutrition Education: You agencies that may benefit ;	have the right to receive nutrition education, including referrals to other programs and rou.		
	Fair Hearing: If you disage hearing, call 480-521-5700 outcome of the fair hearing over issuances received wi request a fair bearing.	ee with any of the above action(s), you have the right to request a fair hearing. To request a fair , or write the Food and Nutrition Division. You may continue to receive benefits pending the . However, if the fair hearings official decision is not in your favor, you will be held liable for any nile awaiting the outcome of the fair hearing. You have 90 days from the date of this notice to		
	colocate and noning.	See reverse for USDA/EOE/ADA disclosures		

STEP 17: Give the Notice of Action form to each client via mail or in person.

Need a copy of the CSFP Notice of Action Form? Find it in the CSFP Forms for Clients section of the Agency Toolkit, STEP 18: Turning back to your Excel spreadsheet, compare your number of Active clients with your total CSFP caseload to see if you have space to enroll clients from your Waiting List.

On first tab of the spreadsheet, right click on "line 1" and delete it so the names of the columns do not show

	Α	В	С	D	E	F	G
1	CSFP ID	Status	Status Change	Last Name	First Name		

STEP 19: Scroll to the bottom of your "Active" list.

Look at the number next to the last "Active" clients name - that is how many "Active" clients you have registered in Link2Feed

			Α	В	С	D	
		1	893331	Active	6/22/2022	а	Be
		2	893349	Active	5/10/2022	a	Of
		3	893415	Active	4/5/2022	a	Tr
		4	893460	Active	11/29/2021	а	Ge
		5	893472	Active	4/5/2022	b	AI
		6	893502	Active	2/2/2022	b	Lu
		7	893527	Active	6/22/2022	b	Do
	\	8	893541	Active	4/5/2022	b	M
		9	893634	Active	12/15/2021	b	Of
		10	893662	Active	12/22/2021	с	Ce
		11	893692	Active	4/5/2022	с	Ш
		12	893737	Active	6/22/2022	d	Jo
		13	893802	Active	11/29/2021	Escontrias	Isa
		14	893851	Active	6/15/2022	f	Gu
		15	893877	Active	1/11/2022	f	Jo
		16	893909	Active	4/5/2022	g	Rc
		17	893916	Active	11/30/2021	j	Sa
		18	893931	Active	4/5/2022	k	Ci
^ +		19	893938	Active	4/5/2022	I	GI
n		20	893940	Active	4/14/2022	m	Ri

Last Clie

STEP 20: Now that you have your # of current "Active" clients, calculate how many clients you can enroll from the Waiting List. To do this, subtract:

(Caseload #) - (Active #) = # Clients you can enroll from your Waiting List If you don't know your Caseload #, please call your St. Mary's Representative

***EXAMPLE: ***

Caseload #: 30 people Active Client Count #: 24 people # of Individuals to Enroll from your Waiting List: 6 people

STEP 21: If you have caseload available, you can enroll clients from your Waiting List.

The clients who have been on the Waiting List the longest should be enrolled first. To identify them, return to the "Waiting List" tab on your Excel spreadsheet

STEP 22: Highlight column C ("Status Change Date") and click "Sort & Filter" on the top, right of the screen, then select "Sort Oldest to Newest".

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CSFP ID	B	Status Change Date	Last Name	E First Name	F	G	н	J	ĸ	L	M	N	0				Filter		U
1323686 1341761	Waiting List Waiting List	4/22/2022 8/2/2021	Lidia Phill	Bonnie Owen													Reapply		
3414171	Waiting List	5/6/2022	Frank	Edward															_

STEP 23: A pop-up will appear. Selec	t "Expa	nd the
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What do you want to do? Expand the selection <u>Continue want the current selection</u>		
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STEP 24: Starting at the top of the list, enroll the number of clients that you have space for in your caseload. See the "How to Activate Clients from Waitlist" instruction guide in the Agency Toolkit to help you issue the appropriate notifications and make changes in Link2Feed

Note: Once you have enrolled your full caseload, if you receive additional requests to participate in CSFP, invite those clients to join the Waiting List. To do this you will change their status to "Waiting List" on the CSFP tab in Link2Feed and provide them with the Notice of Action form marked with their Waiting List enrollment date.

Please pull the Kit Issuance report and send Notice of Action forms, following the instructions on this guide, after submitting your MIR form each month.