

# PantryTrak Overview

The following pages provide the basic information for logging in and using the key functions.

For more detailed information: there is a 77-page PDF training document on the desktop of the front desk computer. (Note: a printout of this document is in a binder at the front desk.)

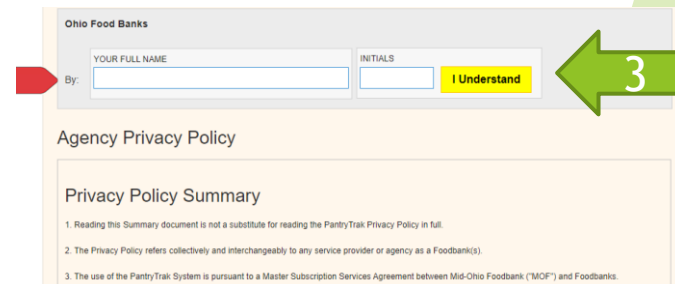
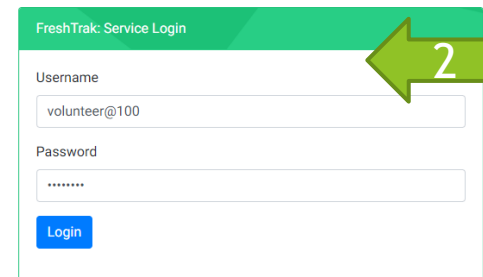
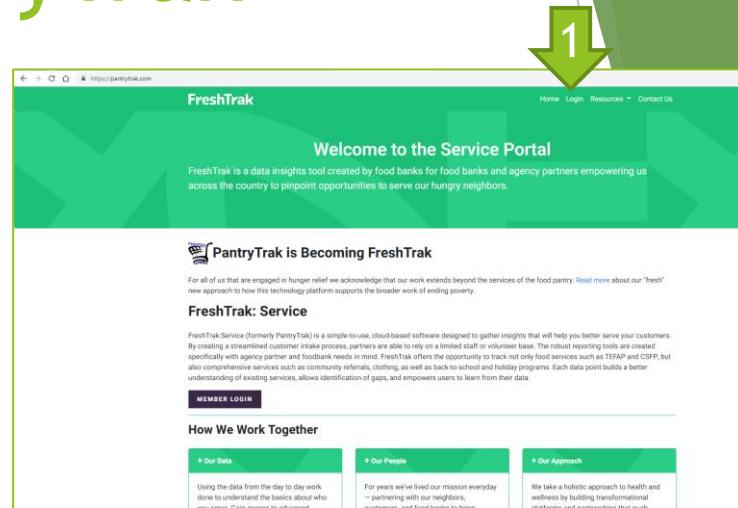
When logging in, anything that is input, updated, or changed is automatically saved. In some cases, reversing those changes is difficult. Please DO NOT use the actual PantryTrak system to practice or learn the system.

If you'd like to practice/learn, you can visit this demonstration website. You can input families, make, changes, etc. as this is just a practice website. Feel free to play around in the demo system as much as you want.

- demo.pantrytrak.com
- User Name: demo@mof
- Password: moref00d!

# Logging in to PantryTrak

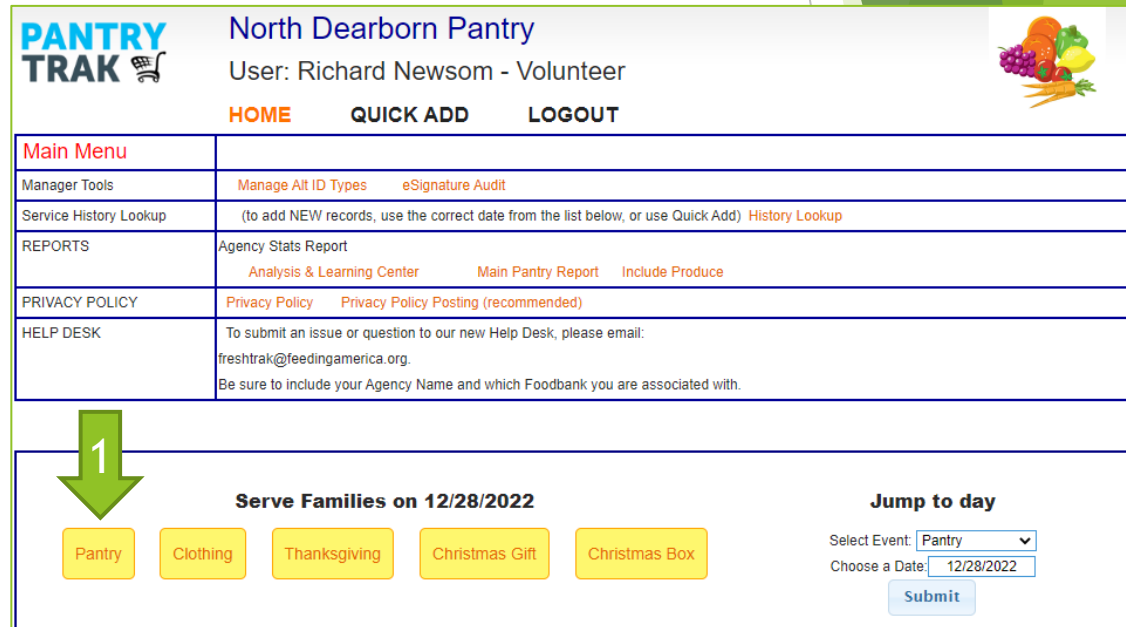
1. Go to Pantrytrak.com and then click on Login in the upper right
2. Enter ID and password. Note, the ID is NOT case sensitive, but the password IS case sensitive.
3. Read the Privacy Policy, then input your Name and Initial to confirm that you agree and will adhere to the Policy.



# How to Begin - Choose the Service Delivered

1. Choose the service associated with why the Patron is visiting today. The vast majority of patrons come for food so please select “Pantry”.

Note: If patron is there for multiple services (e.g. Food and Clothing, you will be able to capture that later so just select the primary purpose for their visit.)



**PANTRY TRAK** North Dearborn Pantry  
User: Richard Newsom - Volunteer

[HOME](#) [QUICK ADD](#) [LOGOUT](#)

<b>Main Menu</b>	
Manager Tools	<a href="#">Manage Alt ID Types</a> <a href="#">eSignature Audit</a>
Service History Lookup	(to add NEW records, use the correct date from the list below, or use Quick Add) <a href="#">History Lookup</a>
REPORTS	Agency Stats Report <a href="#">Analysis &amp; Learning Center</a> <a href="#">Main Pantry Report</a> <a href="#">Include Produce</a>
PRIVACY POLICY	<a href="#">Privacy Policy</a> <a href="#">Privacy Policy Posting (recommended)</a>
HELP DESK	To submit an issue or question to our new Help Desk, please email: <a href="mailto:freshtrak@feedingamerica.org">freshtrak@feedingamerica.org</a> . Be sure to include your Agency Name and which Foodbank you are associated with.

**1**

**Serve Families on 12/28/2022**

[Pantry](#) [Clothing](#) [Thanksgiving](#) [Christmas Gift](#) [Christmas Box](#)

**Jump to day**

Select Event:

Choose a Date:

# Searching for a Patron/Family

1. Search for the patron. ALWAYS do a search even if they have never visited North Dearborn Pantry before. They may have visited another pantry in the area and their information could already be in the system.

HOME Lists: **Regular** Expanded Serving Check-In Serv

Search for a Family...  Type abbreviated name here  
Ex. Search for George Washington by typing "was,geo" [View Help](#) RESET

**Name** Address DOB Phone Alt ID  Expand

[Add New Family & Visit](#)  
Service Visit list for Friday 12/23/2022, Pantry

[SHOW Notes](#)

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	New?	Notes
-----------------	------	---------	-------------	--------	-----	---------------------	--------------	------	--------	------	-------

Visits - 0  
Number of Visits by Time Slot

State  
Total Families Served - 0  
NEW Families Served - 0  
No Show - 0

Family Size  
1-3 - 0  
4-6 - 0  
7+ - 0

[Download CSV](#)

Families without Children - 0  
Families with Children - 0

Total Individuals - 0  
Children (birth - 17) -  
Adults (18 - 59) -  
Seniors (age 60+) -

## Notes / Tips

- You can search by Name, Address, Date of Birth, Phone Number, or Patron ID
- When searching by name:
  - Input a few characters of the last name, then a comma, then the first character of the first name. For example, this search will return all patrons who are R. Smith

HOME Lists: **Regular** Expanded Serving Check-In Serv



smi, r

**Name** Address DOB Phone Alt ID



# Selecting a Patron

1. If shown, click on the desired Patron Name. If the same patron (with the same address) is shown multiple times, select the top one on the list).
2. The last time this patron was served at the pantry is listed here.
3. If this patron is not listed, then click on “Add New Family & Visit”.

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

smi, r  Found 2 matches - Hover over the info icon to see more information. Clicking the link will add the visit immediately. [RESET](#)  Expand 

Search these results:

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
1 Families that You Have Served							
<a href="#">Smith, Ryan</a>		22167 JACKSON RIDGE RD	LAWRENCEBURG, IN	47025		none	<input type="checkbox"/>
1 Families in Your Area That You Have Not Served							
<a href="#">Smith, Robin</a>		3179 WOODS RD	LAWRENCEBURG, IN	47025		none	<input type="checkbox"/>

Showing 1 to 4 of 4 entries

[Add New Family & Visit](#)


**Service Visit list for Friday 12/23/2022 , Pantry**

[SHOW Notes](#)

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	New?	Notes
-----------------	------	---------	-------------	--------	-----	---------------------	--------------	------	--------	------	-------

# Verify Patron Info

1. Use info shown to confirm this is the correct patron.
2. Update data as necessary including adding/removing family members as the household changes. To help you notice if there is missing information, it will be shown in pink.



**Smith, Ryan**

LAST  FIRST  MIDDLE  SUFFIX

Homeless

**Home Address**

STREET ADDRESS

APT#, LOT#, ETC OR LEAVE BLANK.

CITY  STATE

ZIP CODE

COUNTY


Address Verified (optional): NO  YES

MAIN PHONE  2ND PHONE  NO PHONE NUMBER

Family Size	4	Children	2	Adults	2	Seniors	0
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Family Notes

Proxy




Other Information/Questions [Hide](#)

Is the household below the 200% poverty TEFAP guidelines?  
 Freestore  
 Yes

Service Provided	Date & Time	Optional Reporting
<input type="button" value="Add Secondary Service"/>		
Primary Service - <input type="text" value="Pantry - Choice - 14 day"/>	12/23/2022 at 05:35 AM	(Show)

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Race/Ethnicity	Gender	Identification	Status
Ryan		Smith		<input type="text"/>	40	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	
Adult1		Smith		<input type="text"/>	35	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Child1		Smith		<input type="text"/>	10	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Child2		Smith		<input type="text"/>	10	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive



# Input Patron Visit

1. Choose the correct service. System will default of “Pantry - Choice - 14 day”. This is our normal food pick-up.
2. The date and time of service is automatically filled. If necessary, it can be updated.
3. Click on “Not Required” for signature.
4. Click on “Served” as we fill food orders as soon as the patron arrives.
5. The “Alt IDs” button is used to input our patron number. See next slide for instructions on adding a patron ID number.
6. If they also got clothing, picked up a holiday food box, etc. then you can add a secondary service.

The screenshot shows a web form for entering patron visit information. It includes a header with service and date/time selection, a table for patron details, signature options, service status, and an Alt IDs input field. Numbered arrows indicate the steps described in the text.

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Race/ Ethnicity	Gender	Identification	Status
Ryan		Smith			40	Please Choose	OF <input checked="" type="radio"/> M <input type="radio"/> OO	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	
Adult1		Smith			35	Please Choose	OF <input checked="" type="radio"/> M <input type="radio"/> OO	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Child1		Smith			10	Please Choose	OF <input checked="" type="radio"/> M <input type="radio"/> OO	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Child2		Smith			10	Please Choose	OF <input checked="" type="radio"/> M <input type="radio"/> OO	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive

HOW DID THEY SIGN?

SERVICE VISIT STATUS:

Alt IDs

"Take-a-Number" tracker (optional) Client's # in line -0 Choose Serving Status

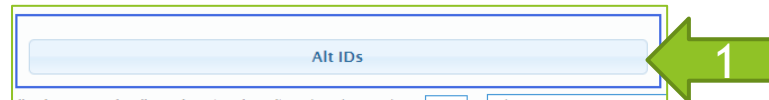
Family Status  
 New Family  Previously Served

## Notes / Tips

- The system automatically saves your entries so no need to click save.
- When finished with the above steps, simply close the entire window and you'll be able to search for your next patron. DO NOT click the button above for “Close Window & Add Another Service” unless you are actually adding another service for the same patron.

# Add a Patron ID Number

1. Click the button for “Alt IDs”.
2. Click “Add Alt ID”. Do this for the head of household ONLY.
3. Type in the patron ID from the master list at the front desk.
4. ID Type should be set to “Any Card”.
5. Click “Add ID”



A screenshot of a software interface showing a table with columns: First Name, Middle Name, Last Name, ID, Type, and Status. The table contains two rows: Alexandra Ballard and Michael Kreuzer. Each row has a green "Add Alt ID" button in the ID column. A green arrow with the number "2" points to the "Add Alt ID" button for Alexandra Ballard.

First Name	Middle Name	Last Name	ID	Type	Status
Alexandra		Ballard	Add Alt ID		
Michael		Kreuzer	Add Alt ID		

A screenshot of a software interface showing a dialog box titled "Add Alt ID for Alexandra Ballard". The dialog box contains fields for ID, ID Type, and buttons for Cancel, Add ID, and Add Type. A green arrow with the number "3" points to the ID field. A green arrow with the number "4" points to the "Add ID" button. A green arrow with the number "5" points to the "Add ID" button in the table below the dialog box.

Add Alt ID for Alexandra Ballard

ID

ID Type

Any Card

First Name	Middle Name	Last Name	ID	Type	Status
Alexandra		Ballard	Add Alt ID		
Michael		Kreuzer	Add Alt ID		



# Adding a New Patron/Family (Step 1)

1. Input all patron info. (Note: Housing type not needed).
2. Input the quantity of each age group in the household.
3. Click Next

HOME Add NEW Family and Service Record for TODAY, Friday Dec 23, 2022 - Step 1 of 3

1

Head of Household (HH)	Last <input type="text" value="Last Name"/>	First <input type="text" value="First Name"/>	Middle <input type="text" value="Middle Name"/>	Suffix <input type="text" value=""/>
Address Line(s)	<input type="checkbox"/> Homeless	Street Address <input type="text" value="EXAMPLE: 123 Foodie Way"/>		Housing Type: <input type="text" value="Please Select Housing Type"/>
		Apt#, Lot#, Etc or Leave Blank <input type="text" value=""/>		
		Zip Code (5 digits only) <input type="text" value="Zip Code"/> < Enter Zip Code to lookup City, State, County		
Phone Numbers	Phone- <input type="text" value="Primary Phone Number"/>	2nd Phone- <input type="text" value="Secondary Phone Number"/>	No Phone Number <input type="checkbox"/>	
Personal Information (HH)	Date of Birth <input type="text" value=""/>	OR Age - <input type="text" value="Age"/>	DON'T KNOW? Use a Placeholder of <input type="checkbox"/> 25 <input type="checkbox"/> 40 <input type="checkbox"/> 65	
	Gender: <input type="radio"/> F <input type="radio"/> M <input type="radio"/> Not Specified or Listed			
Total # of people in household by Age Group:	# people 60+ yrs. <input type="text" value="Seniors -"/>	# people 18 - 59 yrs. <input type="text" value="Adults"/>	# people birth - 17 yrs. <input type="text" value="Kids"/>	2

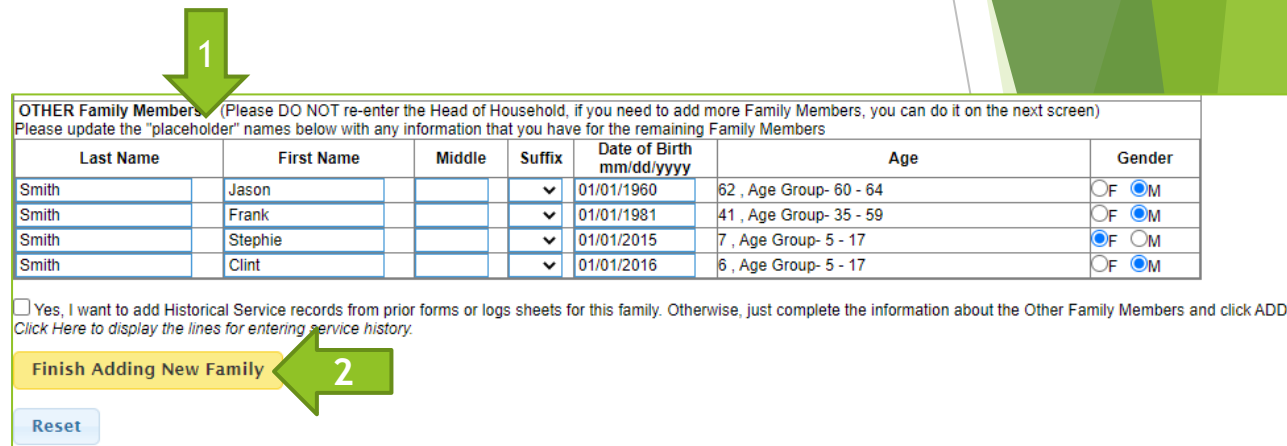
3

NEXT

Reset

# Adding a New Patron/Family (Step 2)


1. Input all family info. DO NOT input the head of household on this screen.
2. Click “Finish Adding New Family”.



**OTHER Family Members** (Please DO NOT re-enter the Head of Household, if you need to add more Family Members, you can do it on the next screen)  
Please update the "placeholder" names below with any information that you have for the remaining Family Members

Last Name	First Name	Middle	Suffix	Date of Birth mm/dd/yyyy	Age	Gender
Smith	Jason		▼	01/01/1960	62 , Age Group- 60 - 64	<input type="radio"/> F <input checked="" type="radio"/> M
Smith	Frank		▼	01/01/1981	41 , Age Group- 35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M
Smith	Stephie		▼	01/01/2015	7 , Age Group- 5 - 17	<input checked="" type="radio"/> F <input type="radio"/> M
Smith	Clint		▼	01/01/2016	6 , Age Group- 5 - 17	<input type="radio"/> F <input checked="" type="radio"/> M

Yes, I want to add Historical Service records from prior forms or logs sheets for this family. Otherwise, just complete the information about the Other Family Members and click ADD  
[Click Here to display the lines for entering service history.](#)

**Finish Adding New Family** 

Reset

# Adding a New Patron/Family (Step 3)



**Smith, Rachel**

LAST  FIRST  MIDDLE  SUFFIX

Homeless

**Home Address**

STREET ADDRESS

APT#, LOT#, ETC OR LEAVE BLANK.

CITY  STATE

ZIP CODE

COUNTY

Address Verified (optional): NO  YES

MAIN PHONE  2ND PHONE  NO PHONE NUMBER

Family Size	5	Children	2	Adults	2	Seniors	1
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Family Notes

Proxy



1. Confirm data was input correctly and update it as needed.

2. Additional notes can be captured as needed (e.g. Township, allergies, special needs, etc.)

3. Finish adding their service info for this visit (see previous pages for instructions).



Service Provided	<input type="button" value="Add Secondary Service"/>	Date & Time	Optional Reporting	Reporting Event
Primary Service -	Pantry - Choice - 3 day	12/23/2022 at 10:00 AM	(Show)	Food Pantry

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Age Group	Gender	Identification	Status
Rachel		Smith		01/01/1980	42	35 - 59	<input type="radio"/> F <input type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	
Jason		Smith		01/01/1960	62	60 - 64	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Frank		Smith		01/01/1981	41	35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Stephie		Smith		01/01/2015	7	5 - 17	<input checked="" type="radio"/> F <input type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Clint		Smith		01/01/2016	6	5 - 17	<input type="radio"/> F <input checked="" type="radio"/> M	<input type="radio"/> Needed <input checked="" type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive