

CSFP Paperless Barcode Trouble Shooting Guide

1. The client doesn't show up on the Participating CSFP Paperless Barcode Roster

a. Participating client – Check the following client case areas and the client CSFP form.

i. "Edit Case"

ii. "CSFP" tab

1. CSFP Only – Participating (Only marked by Tyler office)

2. TYLER ETFB USE ONLY – Transferred to Paperless

a. Yes

iii. "CSFP Paperless" tab

1. CSFP Site Agency for Client

a. Is your site the dropdown site chosen? If not did the client choose to transfer?

2. CSFP Program Status

a. Participating – if it is not marked please select.

b. Does the client have a Formal Review assigned by Tyler office?

3. Signup Date (Date Placed on Waiting List)

4.

iv. Click - "Save Changes"

v. Open "CSFP" side tab at right bottom.



1. Preview the CSFP information in the large white section. If it does not show Participating to match the client case information then "Edit" the CSFP form to match the client case information.

2. Does the Formal Review match the assigned information on the client case?

a. If it matches no need to do anything.

b. If it does not match then add the Formal Review date below the Participating designation.

3. Check the timestamp at the bottom of the CSFP form when editing.

a. Edit Entry Date/Time – should match the sign up date above. If it doesn't match please edit the information to reflect the date/time of signup.

vi. Click – "Save & Close"

b. Open the client's "Assistance" tab.

i. Sort the records - Show

assistance **for...**

1. Is there a "Benefits: Senior Box Enrollment assistance record? (It will be pink) If it is missing add the "Benefits: Senior Box Enrollment" assistance record. It should be dated for the signup date.

ii. Sort the records - Show

assistance **for...**

1. Is there a "CSFP-(CSFP Approved Agency Only) assistance request record?(It will be yellow) If it is missing add the "CSFP-(CSFP Approved Agency Only) assistance request record. It should be dated for the signup date.

2. **The client doesn't show up on the Waiting CSFP Paperless Barcode Roster**

a. Wait list client - Check the following client case areas and the client CSFP form.

i. "Edit Case"

ii. "CSFP" tab

1. CSFP Only – Waiting List (Marked by assigning site)

2. TYLER ETFB USE ONLY – Transferred to Paperless

a. Yes

iii. "CSFP Paperless" tab

1. CSFP Site Agency for Client

a. Is your site the dropdown site chosen? If not did the client choose to transfer?

2. CSFP Program Status

a. Eligible on Wait List – if it is not marked please select.

3. Signup Date (Date Placed On Waiting List)

a. Is there a date in the boxes?

b. If missing add the date the client signed up for the program.

iv. Click - "Save Changes"

v. Open "CSFP" side tab at right bottom.



1. Preview the CSFP information in the large white section. If it does not show Eligible on Wait List to match the client case information then "Edit" the CSFP form to match the client case information.

2. Does the client have a Formal Review assigned?

a. If it does - remove the formal review date range, it will be assigned by Tyler office when the client is moved to Participating.

3. Check the timestamp at the bottom of the CSFP form when editing.

a. Edit Entry Date/Time – should match the sign up date above. If it doesn't match please edit the information to reflect the date/time of signup.

vi. Click – "Save & Close"

b. Open the client's "Assistance" tab.

i. Sort the records - Show

Senior Box Enrollment



assistance for...

1. Is there a "Benefits: Senior Box Enrollment assistance record? (It will be pink) If it is missing add the "Benefits: Senior Box Enrollment" assistance record. It should be dated for the signup date.

ii. Sort the records - Show

CSFP- (CSFP Approved Agency Only)



assistance for...

1. Is there a "CSFP-(CSFP Approved Agency Only) assistance request record?(It will be yellow) If it is missing add the "CSFP-(CSFP Approved Agency Only) assistance request record. It should be dated for the signup date.

3. **The client doesn't show up on the CSFP Waitlist Paperless Barcode Roster in the order of sign up**

a. Wait list client - Check the following client case areas and the client CSFP form.

i. "Edit Case"

ii. "CSFP" tab

1. CSFP Only – Waiting List (Marked by assigning site)

2. TYLER ETFB USE ONLY – Transferred to Paperless

a. Yes

iii. "CSFP Paperless" tab

1. CSFP Site Agency for Client

a. Is your site the dropdown site chosen? If not did the client choose to transfer?

2. CSFP Program Status

a. Eligible on Wait List – if it is not marked please select.

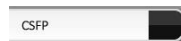
3. Signup Date (Date Placed On Waiting List)

a. Is there a date in the boxes?

b. If missing add the date the client signed up for the program.

iv. Click - "Save Changes"

v. Open "CSFP" side tab at right bottom.



1. Preview the CSFP information if it doesn't show Eligible on Wait List to match the client case information then "Edit" the CSFP form to match the client case information.

2. Does the client have a Formal Review assigned?

a. If it does - remove the formal review date range, it will be assigned by Tyler office when the client is moved to Participating.

3. Check the timestamp at the bottom of the CSFP form when editing.

a. Edit Entry Date/Time – should match the sign up date above. If it doesn't match please edit the information to reflect the date/time of signup.

vi. Click – "Save & Close"

b. Open the client's "Assistance" tab.

i. Sort the records - Show

assistance for...

1. Is there a "Benefits: Senior Box Enrollment assistance record? (It will be pink) If it is missing add the "Benefits: Senior Box Enrollment" assistance record. It should be dated for the signup date.

ii. Sort the records - Show

assistance for...

1. Is there a "CSFP-(CSFP Approved Agency Only) assistance request record?(It will be yellow) If it is missing add the "CSFP-(CSFP Approved Agency Only) assistance request record. It should be dated for the signup date.