


Signing Up a New Paperless CSFP Client

*Must use the  Paperless Login for this process

1. Advance search by birthday; if unable to find search by name
2. Edit Client Case to match the client information
 EDIT CASE
3. Update all 4 tabs of Client Case
 - Tab 1 - Household Information
 - i. All name fields (maiden and suffix)
 1. DoorDash clients will have a DD after their last name
 - ii. Birthday
 - iii. Number of Household Members
 - iv. Gender
 - v. Ethnicity
 - vi. Street Address
 - vii. Mailing Address (copy if the same)
 - viii. County
 - ix. Phone number listed in top spot
 - x. Breakdown of Household Ages (if known)
 - Tab 2 - Eligibility
 - i. Total Gross Household Income
 - ii. Government Benefits
 - iii. Household Eligibility
 - Tab 3 - CSFP
 - i. CSFP ONLY – Choose Waiting for new signups
 - ii. TYLER ETFB USE ONLY – Transferred to Paperless
 1. Yes
 - iii. DoorDash Client - if enrolled in DoorDash
 1. Yes
 - Tab 4 - CSFP Paperless
 - i. CSFP Site Agency For Client
 1. Choose your site name
 2. DD + site name for DoorDash clients
 - ii. CSFP Program Status
 1. Eligible on Wait List
 - iii. Signup Date (Date Placed On Waiting List)
 1. 07 – 21 – 2022
4. Click – Save Changes

5. Update CSFP tab on right side (black - right bottom) with a CSFP form
 - Add CSFP form
 - i. Add Form
 1. Site Agency and Phone number will populate
 2. Add Name of Proxy
 3. Add Proxy Phone number
 4. Start Date of Proxy is date of signup – 07-21-2022 the rest will populate
 5. CSFP Program Status will populate
 6. Edit Entry Date/Time if completed after distribution back date and add in order of signup.
 7. Save & Close
6. Click on the Assistance Tab – Right side of screen
7. Add an Assistance: Choose
 - i. Amount = 1
 - ii. Unit = Box
 - iii. Category = Benefits: Senior Box Enrollment
 - iv. Provided By = CSFP Direct Sites (Applicable for ADMIN login)
 - v. Description = Leave blank
 - vi. Date/Time (MM-DD-YYYY) Current day is good
 - vii. Select: Add
8. Add a Request: Choose
 - i. Amount = 1
 - ii. Unit = Box
 - iii. Category = Food: CSFP- (CSFP Approved Agency Only)
 - iv. Requested From = CSFP Direct Sites (Applicable for ADMIN login)
 - v. Description = Leave blank
 - vi. Status = Approved
 - vii. Date/Time (MM-DD-YYYY) Back date if not the same as sign up
 - viii. Funding Source = Unspecified
 - ix. Select: Add Request
9. Write the client name on the “New to Waiting” sheet in order of signup. If DoorDash write a DD to the left of the clients name.

Available login's for volunteer use:

1. etfbclientsignup#1@etfb.org
2. etfbclientsignup#2@etfb.org
3. csfpprogramdirector@etfb.org
4. Site login for your agency