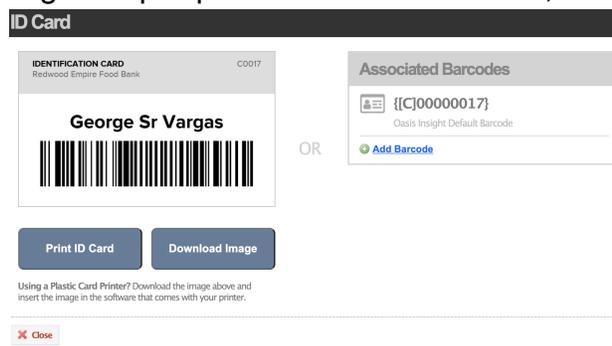




# 1st Time Check-In

## Make sure your tablet and hotspot are charged up

1. Log-in into your W<sup>5</sup> account. If you have a volunteer, make sure you log-in for them before handing over the tablet.
2. Attach the USB cable from the scanner to the tablet. Tablet will automatically recognize the scanner.
3. Choose a Site and click OK. If you do not know the site, clicking OK will bypass this. To change the site, logout and log back in.
4. **Best practice** to always **first search** the client using the search icon on top left. Various ways to search - first name, last name, birth date, email. Due to the common first/last name, **birth date may be the fastest way to search a client or by phone number as they are unique.**
5. For duplicate clients, flag the case. One of the network administrators will review and have the ability to delete the duplicate client.
6. Go to **Barcode Mode** (left hand side). To read more, click this link [Scanner](#) or go to Using the Scanner page.
7. Assign the barcode **ID card**.
  - a. On the right lower corner, select “**ID Card**”.
  - b. To assign our pre-printed barcode W<sup>5</sup> card, click “Add barcode”



- c. Scan the W<sup>5</sup> card barcode. You need to scan twice to verify the barcode. When done, click “Close”. Hand the card to the client. Or you can also manually enter the scan card number and repeat the process to verify the barcode, when done click “close”.



8. Scan the assistance barcode. Then scan the confirm assistance barcode.
9. If the client is picking up two types of assistance, e.g. Senior Basket and Groceries to Go (these barcodes may be unique to your organization group) scan both barcodes then scan the confirm assistance barcode.
10. For **Senior/CSFP clients**, a client signature box will appear. During Covid, scan the “COVID-19” auto signature barcode.- (At this time we are only using Confirm Assistance this may change in the near future)
11. For **Groceries To Go clients**, a client signature EFAP box will appear. There is a check box for “First visit this month”. Confirm the number of households. During Covid, scan the “COVID-19” auto signature barcode. (At this time we are not actively using this feature but may change in the near future)

### **Create Release of Information (ROI)**

1. In the middle top banner, click “**Create New ROI**”. If there is more than one person in the same household, their names will be listed. Only one ROI is needed per household. Check all the names. Click “Next”. It is best to complete the ROI *after* all household members have been added to the head of household’s profile.
2. The household members will be listed if they are already added in the Relationship. To read more, click this link [Relationships](#) or go to the “Relationship” page. (This may be something our partners use more then we use)
3. During the pandemic, volunteer/coordinator will sign “Covid-19” for the clients and volunteer/coordinator can sign on behalf of REFB. Please use your stylus pen to sign in the “Click Here For Digital Signature”.
4. When done click “Submit Signature”.