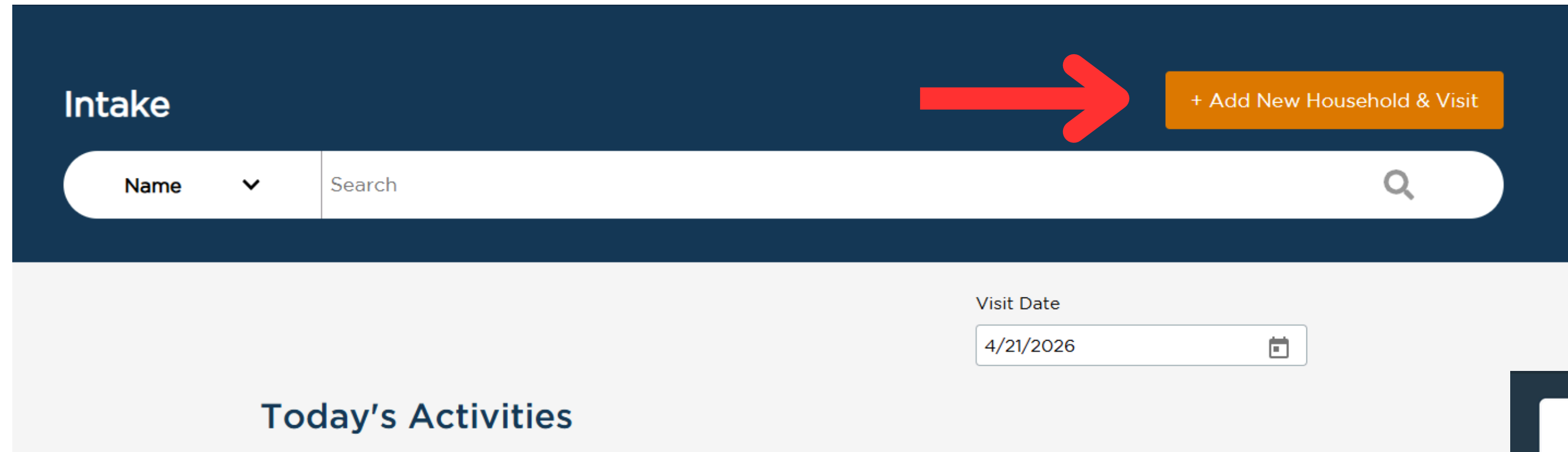
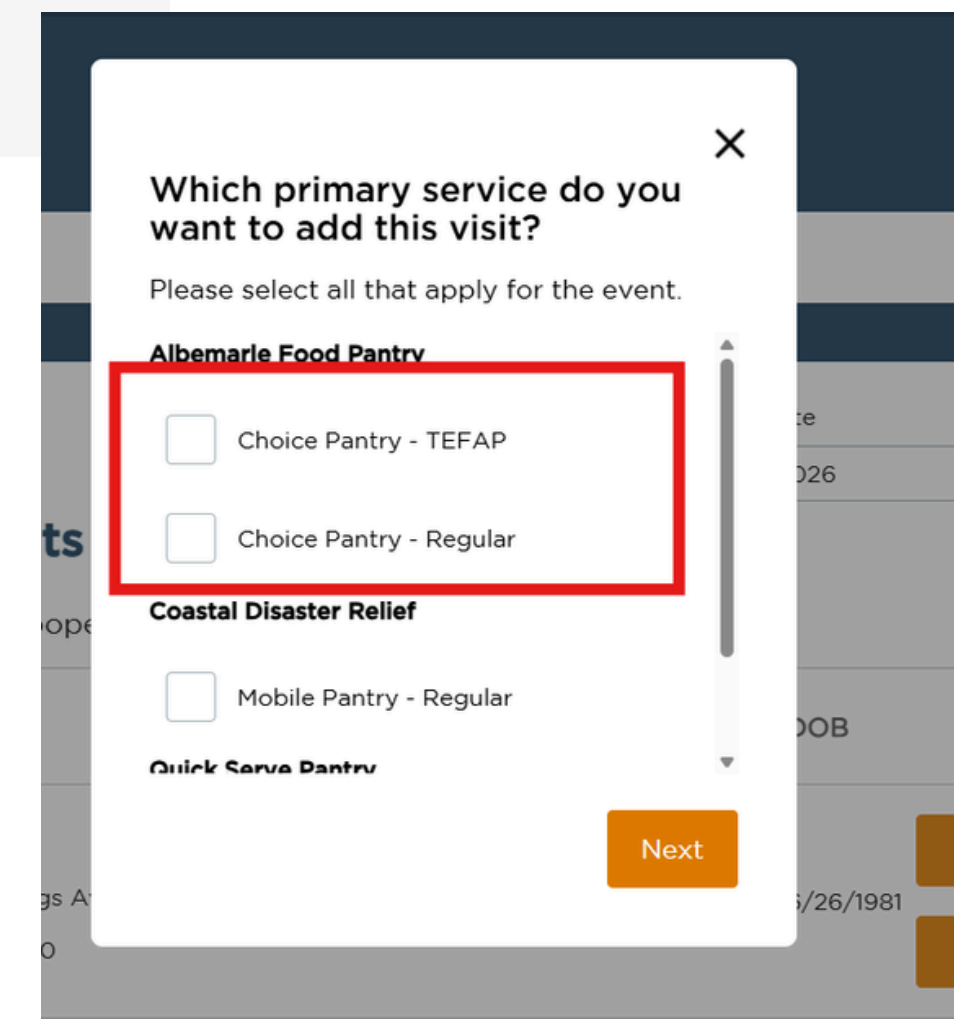


# New Client Intake: TEFAP Creating a New Profile



The screenshot shows the 'Intake' section of a web application. At the top left, the word 'Intake' is displayed in white on a dark blue background. Below it is a search bar with a dropdown menu labeled 'Name' and a search icon. To the right of the search bar is an orange button labeled '+ Add New Household & Visit'. A red arrow points from the search bar area towards this button. Below the search bar, there is a 'Visit Date' field with a calendar icon and the date '4/21/2026'. At the bottom of the section, the text 'Today's Activities' is visible.

When you have searched for the client and they are not in the system, click the “**+Add New Household & Visit**”. A pop up for service will appear (seen on the right). Click what service they will be receiving today.



The screenshot shows a pop-up form titled 'Which primary service do you want to add this visit?'. The form includes a close button (X) in the top right corner and a sub-header 'Albemarle Food Pantry'. Below this, there are two radio button options: 'Choice Pantry - TEFAP' and 'Choice Pantry - Regular'. A red box highlights these two options. Below these options, there are other service categories: 'Coastal Disaster Relief' with a 'Mobile Pantry - Regular' option, and 'Quick Serve Pantry'. At the bottom right of the form is an orange 'Next' button.

Anything that has \* is required and must be filled out. If the Client does not have a address or phone (or prefers not to answer) check the **“No Fixed Address”** and **“No Phone”** boxes at the end of each fill in box.

### Add New Household

2 signature 3 Household Info

#### Basic Information

*First Name <input type="text"/>	Middle Name (Initial) <input type="text"/>	*Last Name <input type="text"/>
<small>* This is required</small>		<small>* This is required</small>

Suffix

#### Contact

\*Address  
  No fixed address ?

\* This is required

Apartment, Floor, etc.

*City <input type="text"/>	*State <input type="text" value="Select"/>	*ZIP <input type="text"/>
<small>* This is required</small>	<small>* This is required</small>	<small>* This is required</small>

County

Email Address  
  Ok to contact ?

\*Phone #  
  Ok to contact ?  No phone

\* This is required

What method of communication do you prefer?

Text  Call  Email

## Household

How many active people in your household, **not including yourself**, will benefit from the services provided today?

Household Members

− 0 +

## Household

How many active people in your household, **not including yourself**, will benefit from the services provided today?

Household Members

− 1 +

Household Members (This is not a requirement for TEFAP)

[Remove #1](#)

\*Status

Active

\*First Name

Frodo

Middle Name (Initial)

\*Last Name

Baggins

Add Member

## Proxy

How many active people outside of your household would be picking up food for you?

Scrolling down; you will see **“Household”**. This is where you will add how many is in the home. The person answering may say “we have 4 in the house” that may include themselves so you will list 3 in **“Household Members”**. The person answering is already counted.

When you add a **“Household Member”** it will auto generate to say **“Adult 1 or Child 1”** then last name. You can add in the name of those in the house. We strongly suggest listing all the adults in case they come to pick up.

Proxies must be listed if they are outside the household. Members listed with a Name will be part of the profile and you will not need to list them as a proxy.

You will have to add a **“Expiration Date”**. This should be at least yearly and a phone number is required.

**Proxy** ^

How many active people outside of your household would be picking up food for you? ?

Proxies

- 1 +

[Remove #1](#)

Type of Proxy: Proxy

Expiration Date: 1/1/2030

\*First Name: Grandelf

Middle Name (Initial):

\*Last Name: Grayhem

Suffix: Select

Address:

Apartment, Floor, etc.:

City:

State: Select

ZIP:

\*Phone #:   No phone

\* This is required

[Add Proxy](#)

Primary Service Provided

Choice Pantry - TEFAP

Pounds  Pieces  Dollars  Meals

Description

Data Sharing Acknowledgement

To improve our programs and connect you with additional services, we may need to share your personal information with third parties, such as healthcare providers, social service providers, and our other partners, as described in our [Privacy Policy](#). Please indicate below whether you agree to share your personal information with these third party organizations. We will not deny you services based on your answer.

Acknowledgement to share personal information with third parties

- I agree to share my personal information with third parties
- I do **not** agree to share my personal information with third parties

Print Or Add Card

Please print a new ID card or scan an existing card to add this household.

How many alternate identifiers would you like to add to this household?

Alternate Identifiers

Enter or Scan Barcode

You have reached the last page!  
You can scroll past the “Pounds” to  
“**Data Sharing Acknowledgment**”.

Click the one the client wishes to do.

You will see the Client’s Alt ID #. At this time you can print a ID card for them or you can fill out the FBA Client Card to give to them (this is Optional).

You can now click “**Finish**” and the visit will be logged and the screen will return to the Intake Home Screen.