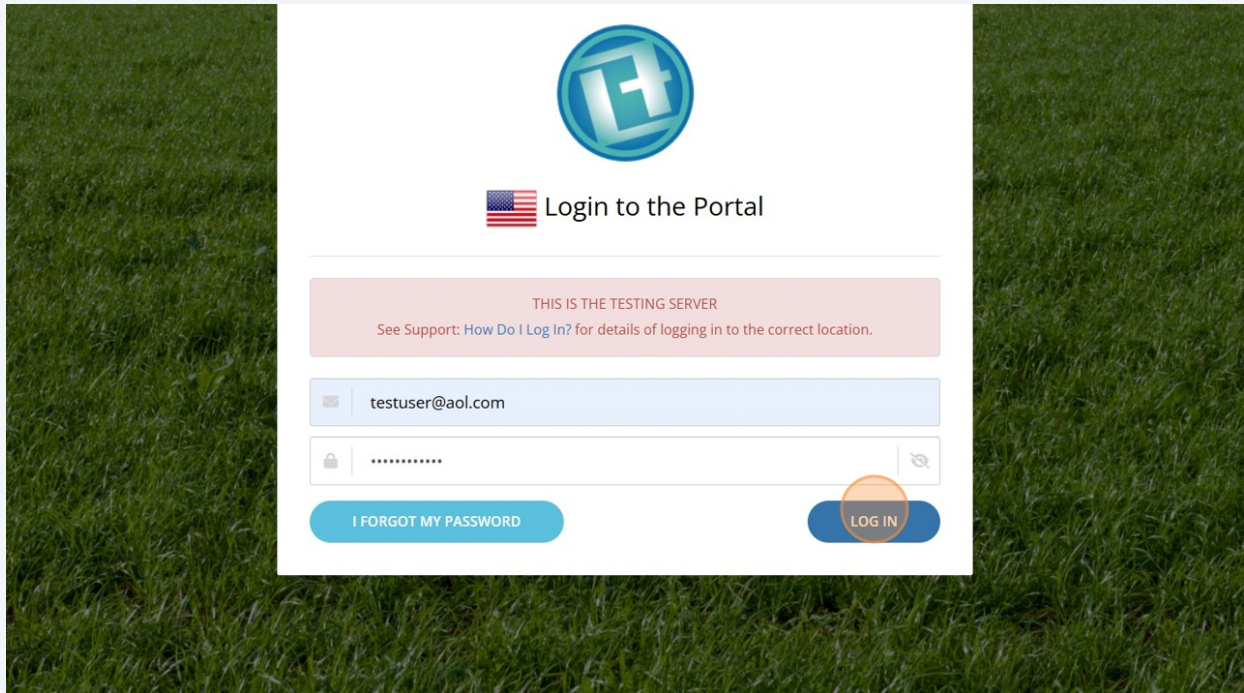
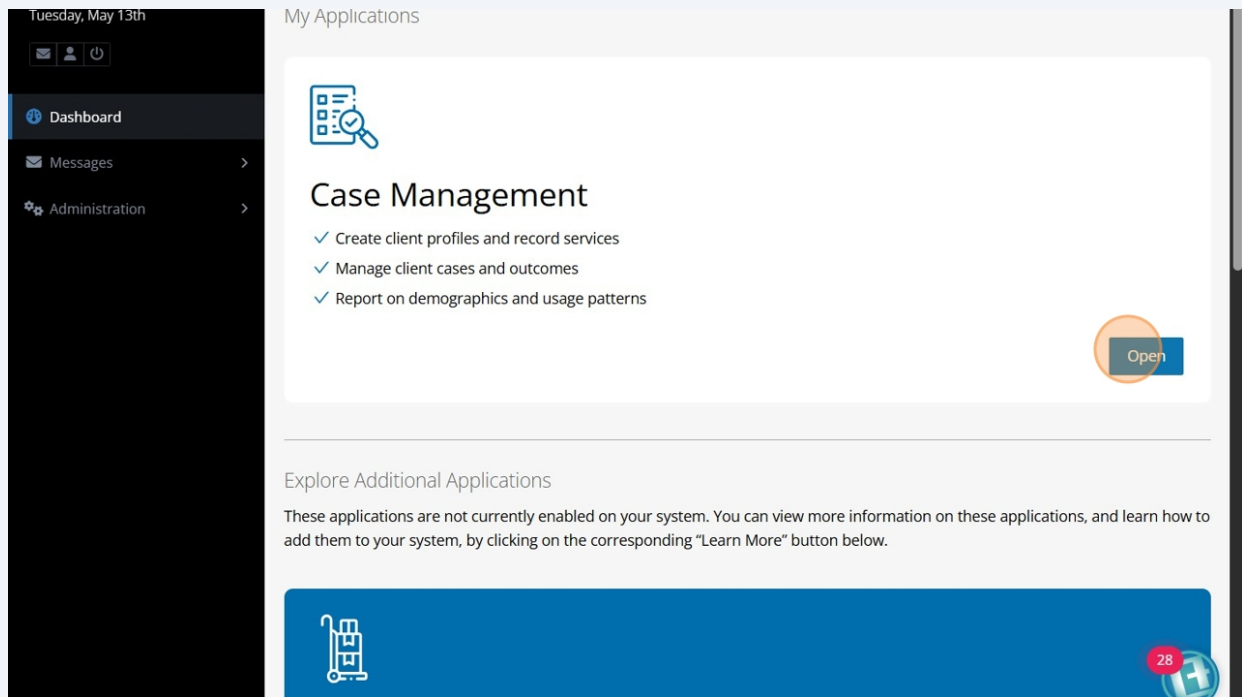


Appointment List Check-In Step by Step Guide

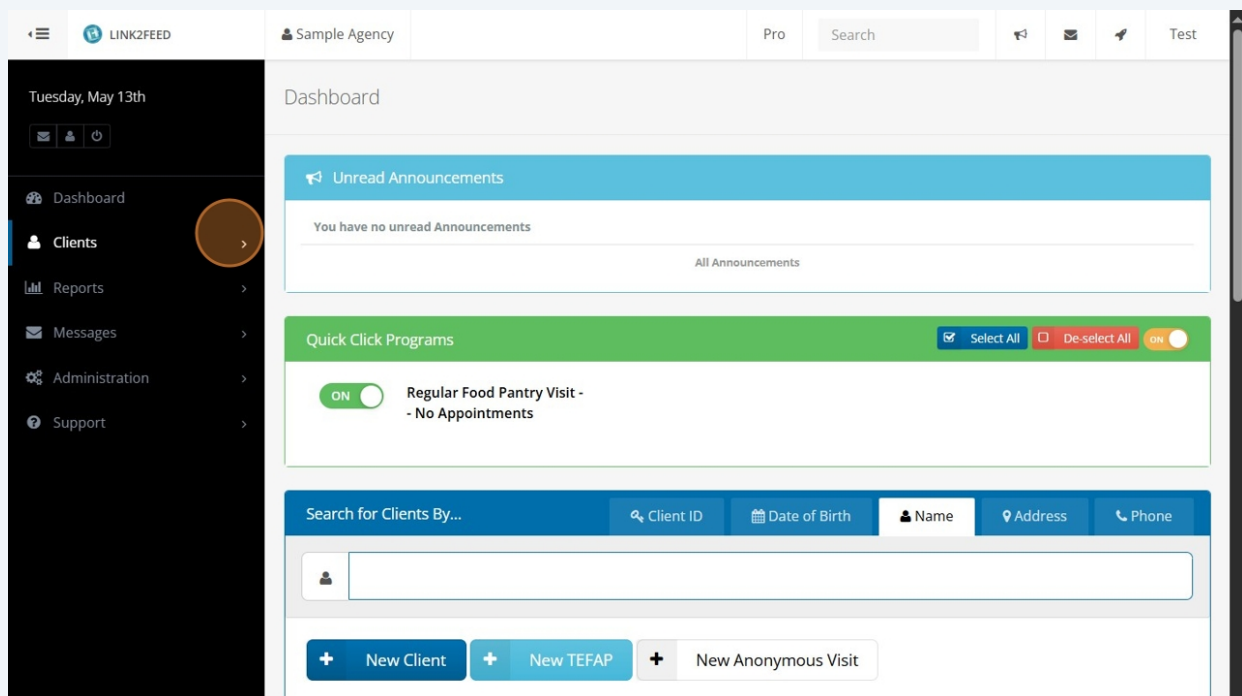
1 Login to your account.



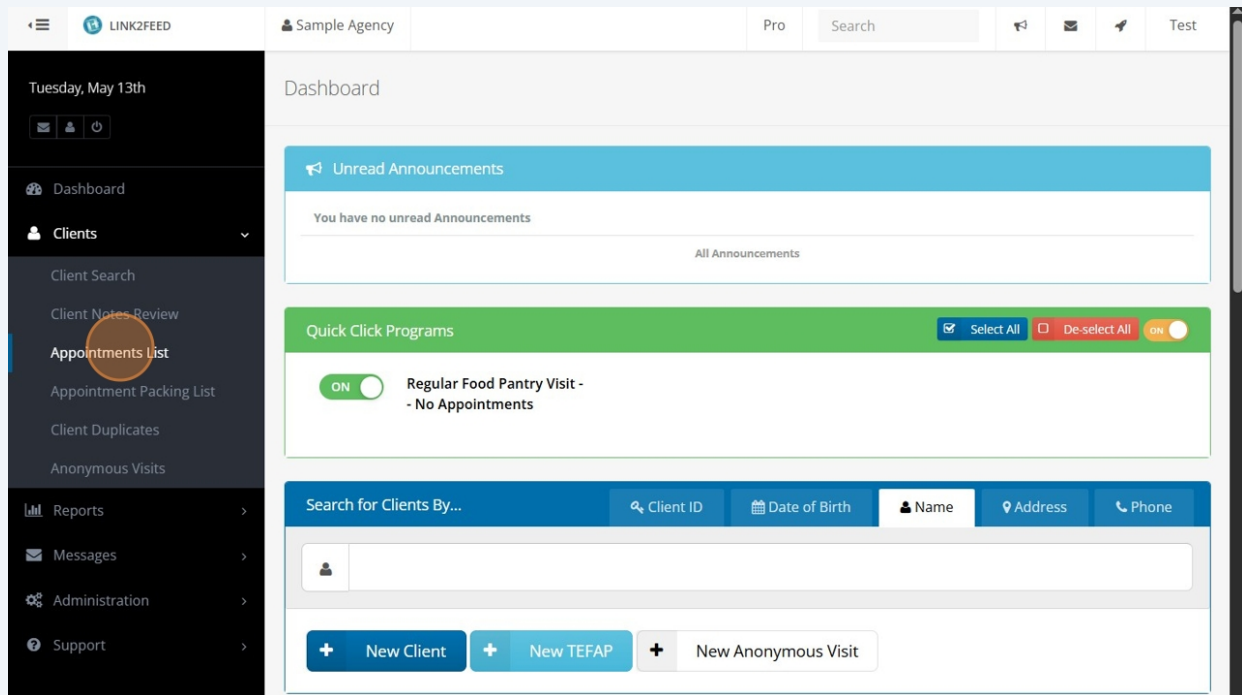
2 Click "Open" on Case Management



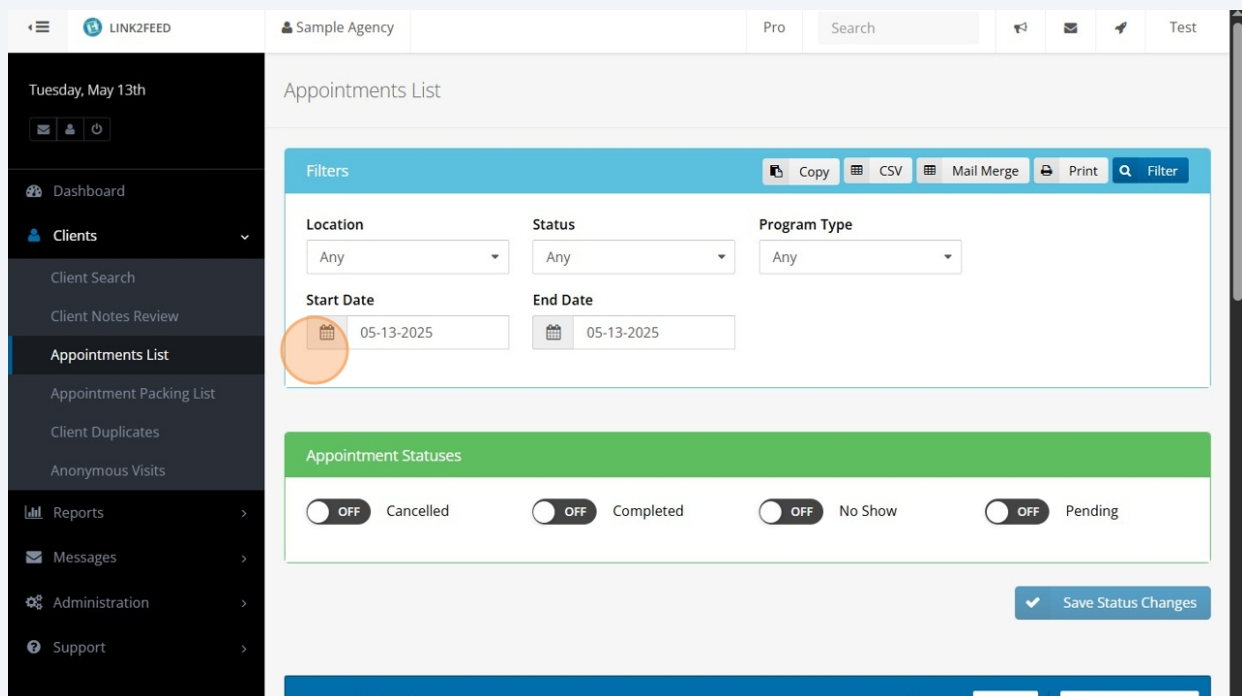
3 Click "Clients" on the left hand side



4 Click "Appointments List"



5 It will auto populate to today's date. You can change the date and select the program type if needed.



6 You can then press filter to find the exact distribution/date you need.

The screenshot shows the LINK2FEED interface. On the left is a dark sidebar with navigation links: Dashboard, Clients, Reports, Messages, Administration, and Support. The main area is titled 'Appointments List'. Below the title is a 'Filters' section with a blue header. In the header, there are buttons for 'Copy', 'CSV', 'Mail Merge', 'Print', and 'Filter' (which is circled in orange). The filter section contains three columns of dropdown menus: 'Location' (set to 'Any'), 'Status' (set to 'Any'), and 'Program Type' (set to 'Any'). Below these are 'Start Date' and 'End Date' fields, both set to '05-13-2025'. At the bottom of the filter section is a 'Save Status Changes' button. Below the filter section is a green bar labeled 'Appointment Statuses' with four toggle switches: 'Cancelled' (OFF), 'Completed' (OFF), 'No Show' (OFF), and 'Pending' (OFF). A 'Save Status Changes' button is also present at the bottom right of the status section.

7 The appointment list will populate. You will see their Client ID and First and Last Name.

The screenshot shows the LINK2FEED interface with the 'Appointments List' table populated. The table has a blue header and a search bar. The table columns are: Client #, Name, Date, Appointment Details, Household, Created By, Consent Status, Email, Phone Number, and Status. The first row shows a client with ID 168164, name 'Test, Tester', date '05-13-2025 @ 8:45 AM', appointment details 'Dietary Considerations: Prefer Not to Answer', household '2 x Adults, 0 x Seniors, 0 x Children', created by 'Madison Thuve', consent status 'Voice: No, Text: No, Email: No', and status 'Pending'. The second row shows a client with ID 168698, name 'Jones, Mary', date '05-13-2025 @ 9:00 AM', appointment details 'Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat', household '0 x Adults, 1 x Seniors, 1 x Children (15 year old)', created by 'Madison Thuve', consent status 'Voice: No, Text: No, Email: No', phone number '(213) 231-4321', and status 'Pending'. A 'Save Status Changes' button is visible at the top right of the table area.

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM	Dietary Considerations: Prefer Not to Answer Notes: Needs Diapers/Baby Supplies	2 x Adults 0 x Seniors 0 x Children	Madison Thuve	Voice: No Text: No Email: No			Pending
168698	Jones, Mary	05-13-2025 @ 9:00 AM	Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	0 x Adults 1 x Seniors 1 x Children (15 year old)	Madison Thuve	Voice: No Text: No Email: No		(213) 231-4321	Pending

8 You will be able to verify the date and time of their appointment.

The screenshot shows the LINK2FEED interface with a sidebar on the left containing navigation links: Dashboard, Clients, Reports, Messages, Administration, and Support. The main content area displays the 'Appointments List' table. The table has columns for Client #, Name, Date, Appointment Details, Household, Created By, Consent Status, Email, Phone Number, and Status. Two appointments are listed. The first appointment, for Client 168164 (Test, Tester), is highlighted with an orange circle around the date and time '05-13-2025 @ 8:45 AM'. The second appointment is for Client 168698 (Jones, Mary) on '05-13-2025 @ 9:00 AM'.

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM	Dietary Considerations: Prefer Not to Answer Notes: Needs Diapers/Baby Supplies	2 x Adults, 0 x Seniors, 0 x Children	Madison Thuve	Voice: No, Text: No, Email: No			Pending
168698	Jones, Mary	05-13-2025 @ 9:00 AM	Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	0 x Adults, 1 x Seniors, 1 x Children (15 year old)	Madison Thuve	Voice: No, Text: No, Email: No		(213) 231-4321	Pending

9 Here you can see any dietary considerations or notes for this person.

This screenshot is identical to the one above, showing the same 'Appointments List' table. In this view, an orange circle highlights the 'Appointment Details' column for Client 168164, specifically the 'Dietary Considerations' and 'Notes' fields.

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM	Dietary Considerations: Prefer Not to Answer Notes: Needs Diapers/Baby Supplies	2 x Adults, 0 x Seniors, 0 x Children	Madison Thuve	Voice: No, Text: No, Email: No			Pending
168698	Jones, Mary	05-13-2025 @ 9:00 AM	Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	0 x Adults, 1 x Seniors, 1 x Children (15 year old)	Madison Thuve	Voice: No, Text: No, Email: No		(213) 231-4321	Pending

10

Once you verify you have found the correct person/appointment to check in - you will move over to 'Status' on the right hand side of the webpage.

The screenshot shows the LINK2FEED web application interface. On the left is a dark sidebar with navigation links: Dashboard, Clients, Reports, Messages, Administration, and Support. The main content area displays the 'Appointments List' table. The table has columns: Client #, Name, Date, Appointment Details, Household, Created By, Consent Status, Email, Phone Number, and Status. The first row (Client # 168164) is highlighted, and its 'Status' cell contains the word 'Pending'. A red circle highlights the 'Status' column header and the 'Pending' cell. A 'Save status changes' button is visible in the top right corner of the table area.

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM	Dietary Considerations: Prefer Not to Answer Notes: Needs Diapers/Baby Supplies	2 x Adults 0 x Seniors 0 x Children	Madison Thuve	Voice: No Text: No Email: No			Pending
168698	Jones, Mary	05-13-2025 @ 9:00 AM	Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	0 x Adults 1 x Seniors 1 x Children (15 year old)	Madison Thuve	Voice: No Text: No Email: No		(213) 231-4321	Pending

11

Select the "Completed" option to check this person in.

This screenshot is identical to the previous one, but the 'Status' cell for the first appointment (Client # 168164) now displays the word 'Complete'. A red circle highlights this cell. The 'Save status changes' button remains visible in the top right corner.

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM	Dietary Considerations: Prefer Not to Answer Notes: Needs Diapers/Baby Supplies	2 x Adults 0 x Seniors 0 x Children	Madison Thuve	Voice: No Text: No Email: No			Complete
168698	Jones, Mary	05-13-2025 @ 9:00 AM	Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	0 x Adults 1 x Seniors 1 x Children (15 year old)	Madison Thuve	Voice: No Text: No Email: No		(213) 231-4321	Pending

12

It will populate a notification in the right hand corner that this appointment was successfully completed - they are now checked in!

LINK2FEED Sample Agency Pro Search Test

Tuesday, May 13th

Dashboard Clients Reports Messages Administration Support

Appointments List Per page: 25 Search

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM Sample Agency Regular Food Pantry Visit	Dietary Considerations: Prefer Not to Answer Notes: Needs Diapers/Baby Supplies	<ul style="list-style-type: none"> 2 x Adults 0 x Seniors 0 x Children 	Madison Thuve	Voice: No Text: No Email: No			Completed
168698	Jones, Mary	05-13-2025 @ 9:00 AM Sample Agency Regular Food Pantry Visit	Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	<ul style="list-style-type: none"> 0 x Adults 1 x Seniors 1 x Children <ul style="list-style-type: none"> 15 year old 	Madison Thuve	Voice: No Text: No Email: No		(213) 231-4321	Pending

Success Appointment status updated.

13

You can also use this Status drop-down to select cancelled if someone chooses to cancel their appointment.

LINK2FEED Sample Agency Pro Search Test

Tuesday, May 13th

Dashboard Clients Reports Messages Administration Support

Appointments List Per page: 25 Search

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM Sample Agency Regular Food Pantry Visit	Dietary Considerations: Prefer Not to Answer Notes: Needs Diapers/Baby Supplies	<ul style="list-style-type: none"> 2 x Adults 0 x Seniors 0 x Children 	Madison Thuve	Voice: No Text: No Email: No			Complete
168698	Jones, Mary	05-13-2025 @ 9:00 AM Sample Agency Regular Food Pantry Visit	Dietary Considerations: Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	<ul style="list-style-type: none"> 0 x Adults 1 x Seniors 1 x Children <ul style="list-style-type: none"> 15 year old 	Madison Thuve	Voice: No Text: No Email: No		(213) 231-4321	Cancelled
168928	Mouse, Minnie	05-13-2025	Dietary Considerations: Prefer Not to	<ul style="list-style-type: none"> 0 x Adults 1 x 	Madison Thuve	Voice: No Text: No	minniemouse@test.com		28

14 Or to select the "No Show" option if they did not show up to their appointment.

		2025 @ 9:00 AM Sample Agency Regular Food Pantry Visit	Vegetarian, Dairy Free (lactose intolerant), Low sodium/saturated fat Notes: —	• 1 × Seniors • 1 × Children ◦ 15 year old		TEXT: NO Email: No		
168928	Mouse, Minnie	05-13-2025 @ 9:15 AM Sample Agency Regular Food Pantry Visit	Dietary Considerations: Prefer Not to Answer Notes: • ALLERGY - SHELLFISH	• 0 × Adults • 1 × Seniors • 1 × Children ◦ 5 year old	Madison Thuve	Voice: No Text: No Email: No	minniemouse@test.com	Complete
168936	Jim, Halpert	05-13-2025 @ 9:30 AM Sample Agency Regular Food Pantry Visit	Dietary Considerations: None Notes: —	• 1 × Adults • 0 × Seniors • 1 × Children ◦ 2 year old	Madison Thuve	Voice: No Text: No Email: No	jimbo@aol.com	No Show
168922	Mouse, Mickey	05-13-2025 @ 9:00 AM Sample Agency Regular Food Pantry Visit	Dietary Considerations: —	• 0 × Adults	Madison Thuve	Voice: No	mickey.mouse@aol.com	Pending

15 If you scroll through the appointment list and cannot find a specific person - you can Click the "Search" field.

Start Date

05-13-2025

End Date

05-13-2025

Appointment Statuses

OFF Cancelled

OFF Completed

OFF No Show

OFF Pending

Save Status Changes

Appointments List

Per page: 25

Search

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168164	Test, Tester	05-13-2025 @ 8:45 AM Sample Agency Regular	Dietary Considerations: Prefer Not to Answer Notes: • Needs Dinner/Baby	• 2 × Adults • 0 × Seniors • 0 × Children	Madison Thuve	Voice: No Text: No Email: No			Completed

16 Begin typing in the person's name - first or last.

The screenshot shows the 'Appointments List' interface. At the top, there are four toggle switches: 'Cancelled' (OFF), 'Completed' (OFF), 'No Show' (OFF), and 'Pending' (OFF). A 'Save Status Changes' button is located to the right. The table has columns: Client #, Name, Date, Appointment Details, Household, Created By, Consent Status, Email, Phone Number, and Status. The first row shows client 168936, Jim Halpert, with an appointment on 05-13-2025 at 9:30 AM. The status is set to 'No Show'. A red circle highlights the 'Name' column for Jim Halpert. At the bottom right, there is a red circle with the number 28 and a blue plus icon.

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168936	Jim Halpert	05-13-2025 @ 9:30 AM	Dietary Considerations: None Notes: Sample Agency Regular Food Pantry Visit	1 x Adults 0 x Seniors 1 x Children 2 year old	Madison Thuve	Voice: No Text: No Email: No	jimbo@aol.com		No Show

Showing 1 to 1 of 1 entries (filtered from 5 total entries)

17 Then you can verify it is the correct person/appointment - and Select the "Completed" option to check them in.

The screenshot shows the 'Appointments List' interface, similar to the previous one. The 'Status' dropdown for the appointment is now set to 'Completed', which is highlighted with a red circle. The 'Cancelled' toggle switch is still OFF. The red circle with the number 28 and the blue plus icon are still present at the bottom right.

Client #	Name	Date	Appointment Details	Household	Created By	Consent Status	Email	Phone Number	Status
168936	Jim Halpert	05-13-2025 @ 9:30 AM	Dietary Considerations: None Notes: Sample Agency Regular Food Pantry Visit	1 x Adults 0 x Seniors 1 x Children 2 year old	Madison Thuve	Voice: No Text: No Email: No	jimbo@aol.com		Completed

Showing 1 to 1 of 1 entries (filtered from 5 total entries)