

## LOBBY JOB DESCRIPTIONS

### FRONT DESK ROLE (sit at front desk with computer to the left)

- Supplies: Computer, pens, colored numbers & numbered sign in sheet, walk-in greeter sheet and numbers & name slips to give to shopper
- Before opening - log in as ADMIN
  - appointmentscheckin ; App0!ntments3!p
  - Go to Reporting > Schedule Report
  - Change Start & End date to today
  - Click Location: 'In Person Store'
  - Click Visit Type: 'In Person'
  - Click 'Run Report' button
  - **Click PDF (orange button) to print a paper copy if needed**
- Greet shopper "Welcome to the Pantry/Good Morning, do you have an appointment today?"
  - **Yes, they have an appointment!**
    - Enter shoppers account number or name and select
      - *If you can't find their appointment and you are using the account number on their pantry card, look them up by first/last name. Document on sign in sheet if they have duplicate accounts.*
    - Check if any child has a birthday icon next to their name.
      - If they do, ask if they got a birthday bag for their child this month. And then add that as an inventory item on the visit.
    - Click NEW VISIT button
      - if you receive a VISIT FREQUENCY ALERT, just confirm they are eligible for today's visit
    - A new window opens. Click SAVE AND EXIT.
      - Here is where you add birthday bag and the child's name in the comments.
    - Give them the next number in the time slot of their appointment, write their name and account number on the sheet next to the corresponding number.
    - Write their name on the colored slip of paper for their shopping cart.
    - Have them take a seat and let them know their number will be called to shop
  - **No, they do not have an appointment! "No problem, we will help you get food today."**
    - *Is this your first time at the pantry? Yes! "Welcome to the pantry"*
      - Look them up in the computer to confirm they don't already have an account (if unsure).
      - If they are new, write their name down in the NEW slot & give them the corresponding number.
      - If the help volunteer is available, have them instruct the new shopper on how to scan the QR code and next steps.
      - If the help volunteer is busy, ask if they have a phone to scan the QR code to create a username and password. If they don't have a phone, they can use the iPad.
      - Direct them to the offices when they are done, and they will tell them about programs, and register their visit.
    - *Is this your first time at the pantry? No, I have been here before.*
      - **If it is before 12:30pm; Or Th 5pm-8pm** - "Wonderful, welcome back! I am going to have you check in with my colleague and they will help you get food today"
        - Help volunteer takes over
      - **If it is 12:30pm- 3pm** - "Wonderful, welcome back!"
        - Look up their name/account number

- If it says REGISTRATION DUE, click the x to continue and log visit. Then direct them to the OFFICE role so they can update registration in a quiet/private area.
- Click NEW VISIT button (if you receive a VISIT FREQUENCY ALERT, just confirm they are eligible for today's visit)
  - If not, direct them to the office volunteer to instruct them on how to make an Extra Virtual Visit
- A new window opens. Click SAVE AND EXIT.
- Give them the next number for the walk-in sheet, write their name and account number on the sheet next to the corresponding number.
- Write their name on the colored slip of paper for their shopping cart.
- Have them take a seat and let them know their number will be called to shop when we start walk-ins.

## HELP ROLE (sit at front desk to the right)

- Supplies: Letters, Clipboard with labeled list of letters, QR code, Username & Password sheets
- Greet shopper. "Welcome to the pantry. We currently are scheduling appointments to shop and I am going to take your name and account number and give you a letter so that the volunteers in the office can help you get food today"
  - Write down their first name and account number
  - Give them the corresponding letter and ask them to have a seat, a volunteer will call them into the office shortly
  - If they ask, options today are appointment (if available), walk in shopping (1pm on Tue), grab and go box, or virtual order (if available). Can provide them with sheet to explain.
- New Clients
  - Show them the QR code they can scan with their phone. Provide iPad if they do not have a phone.
  - Instruct on how to Sign-Up and write down their username & password
    - Username must be UNIQUE – and cannot have a space
    - Password must be 8 characters long, with an upper and lower case letter and a number
  - Have them log-in to fill out registration. Once they are done, they will meet with one of the office volunteers.
    - If they need help, provide assistance with filling out the full registration.
- This role provides direct support to the Front Desk Role if they are not busy.

## NEW SHOPPER INFORMATION

- **\*\* IMPORTANT\*\*** If they live outside DuPage or Will, they can shop today, but let them know about [www.vivory.org](http://www.vivory.org) for pantries closer to them (half sheet at front desk).
- Share information about programming
  - Explain 2 + 2 model. Able to shop 2 EXTRA VFP visits a month, and 2 other visits (in person or VFP)
  - Different supportive services – help with clothing, SNAP, LIHEAP, etc.
- Give them a copy of our pantry flyer with shopping information
- Help ensure they properly fill out the registration form.

## OFFICE ROLE (sit in office)

Office Role is available to help log grab & go boxes, reset/set usernames and passwords, assist in booking future appointments, showing customers how to shop online, log new visit for New Clients & share about our programs. They will also inform customers of Support Services resources and inform staff (if onsite) of customers needing assistance.

- Supplies: Username/Password cards for customers; Grab & Go box with bag of produce (when busy); Walkie Talkie

### Tasks while logged in as ADMIN (lobbyhelp; Reg!5terh3lp)

- Use to look up new shopper and create In Person Visit
  - Look up shopper
  - Click NEW VISIT button
  - Scroll to top and select Visit Type: In Person Visit
  - Click SAVE AND PRINT button at bottom
  - REVIEW NEW SHOPPER INFORMATION WITH CLIENT BEFORE THEY LEAVE OFFICE (see below)
- Look up & set usernames and passwords
  - Look up shopper
  - At the top, you can see the username. If they don't remember the password, you can click the pencil button next to it to create a new password
  - Password must be 8 characters with an upper/lower case and number
  - Write username on business card sized paper (with QR code) and give to shopper to use later
- Update Registrations
  - Our registrations are updated annually. When shopper comes in to update registration:
    - Look up shopper.
    - Confirm top information (phone number, email, address)
      - \*If new address click pencil button and then edit and click SAVE NEW ADDRESS.
      - \*If it is a correction to their address (we had it wrong), edit and then click SAVE CORRECTION.
    - Confirm people in household
      - Open up each to ensure all REQUIRED fields were filled out.
      - If someone new – click orange plus button next to people icon. Enter information
      - If someone no long lives with them – click pencil button next to that person and in the top right corner select DEACTIVATE button. DO NOT DELETE PERSON.
  - Click NEW REGISTRATION button
    - Fill out all required fields and any other that they are willing to provide.
    - DO NOT FILL OUT ANY STAFF ASSESSMENT questions.
    - Click Save and Exit
- Schedule future appointment
  - Look up shopper – confirm that they have not already had 2 in person or virtual pickups this month.
  - Click NEW APPOINTMENT button
  - Select IN PERSON as Visit Type
  - Click Green section on day they would like an appointment
    - We ONLY BOOK 2 WEEKS OUT. Please do not book further out. (i.e. If it is Tuesday, they can book an appointment for 2 Tuesdays out, but NOT for the Thursday of that week as it is just over 2 weeks out)
    - Reasons why: helps keep no show rate lower. Shoppers booking themselves can only book 2 weeks out – need to keep our scheduling consistent.
  - Click ORANGE PLUS BUTTON on the time frame
  - Select to send text day before and email now and day before.
  - Click SAVE AND EXIT button at bottom (**do not** click save and add visit)

- Use to create Grab and Go visits
  - Look up shopper
  - Click NEW VISIT button
  - Scroll to top and select Visit Type: Grab and Go Box
  - Click SAVE AND EXIT button at bottom

#### Tasks done with Customer Log-in

- Help place virtual order (assist getting them started before you send down to 101. Not many volunteers to help place the orders – also helpful to walkie staff to alert that new order is being placed)
  - Have customer use their phone to place order – or you can do it on the iPad. (if you use your computer, you will need to log-out. PS only allows 1 person to be logged in at a time – you or the customer).
  - If shopper does not know their log-in – see above “Look up & set username and password” to get information.
  - Write on business card sized paper and give to shopper to use later
  - Use shopper’s login and password
  - Location: Select ‘Virtual Store’
  - Type of Visit: Select ‘Extra Virtual Visit’ or ‘Virtual Visit’
    - If they prefer to shop in person and want to do that twice this month, have them select Extra Virtual Visit. That does not count against their in person shop.
  - Click orange plus button for the time and day they would like to pick up grocery order
  - Ask if they want to answer the support services interview questions
  - Select items they want – click orange plus button until they get the quantity they want or until limit is reached (limit is for item and category)
  - Click Open Cart to Checkout when done shopping
  - Review cart and click Checkout Now!

#### **NEW SHOPPER INFORMATION**

- Share information about programming
  - Explain 2 + 2 model. Able to shop 2 EXTRA VFP visits a month, and 2 other visits (in person or VFP)
  - Different supportive services – help with clothing, SNAP, LIHEAP, etc.
- Help ensure they properly fill out the registration form.
- Give them a copy of our pantry flyer with shopping information
- If they live outside DuPage or Will, they can shop today, but let them know about [www.vivory.org](http://www.vivory.org) for pantries closer to them (half sheet at front desk).

**Front desk supplies** (things that are ALWAYS on the desk) – Screening tools, Nancy’s business card, flyer about pantry, QR code, parking instructions, translated KEY phrases

## **TROUBLESHOOTING TOOLS**

1. The customer’s camera doesn’t scan QR code.
  - a. Type in website [wscpantry.org/appointment](http://wscpantry.org/appointment)
  - b. Type in website [app.pantrysoft.com/login/wscp](http://app.pantrysoft.com/login/wscp)
2. Customer missed their appointment
  - a. If the appointment was for today, follow the same check in procedures but give them a number in their time slot (if the appt was at 8:30 and it is now 10am give them the next 8:30 number) and ask them to stand by the shopping door to shop next. Alert number caller of the change in sequence.
3. Customer says they have an appointment but you can’t find it using their account number.
  - a. Search by name or address to find customer.
  - b. Usually they have a duplicate account. Not a problem!
  - c. Check them in as usual
  - d. Record duplicate account on check in sheet for Sam (both account numbers); Mark which number is on the card they are using. Sam will keep this as their account number.
4. You are checking in a customer to shop, a VISIT FREQUENCY ALERT pops up.
  - a. Read the alert to determine if the customer is eligible for the service they are receiving. The alert will tell you the available visit types. If you are logging that visit, and they are eligible, click Yes.
5. Placing a virtual order and there are no slots available for when they are here
  - a. If there are still slots today, book for later out, notify the Online Market, and they can pack it earlier. Give them 20 minutes to pack once they place the order, it should be ready, if not sooner.
  - b. If there are no appointments for today, notify the Online Market staff, and have them place the order for a future date. They will still get the food today.