# Provider Ordering Manual

Updated April 30, 2019

# Contents

# Overview

The Eastside Baby Corner (EBC) ordering system is powered by Salesforce, an online database service. This service enables the tracking and reporting that EBC needs to improve its operations, educate its supporters, and apply for specific grants. EBC's provider partners can access the system through the online portal to register recipients, edit and track orders, view past orders, and more.

## Record Types

Providers, Households, Contacts, and Orders are all records in the database that are linked to one another in a hierarchy.

| | Provider | The person placing orders with EBC. |
|---|---|---|
| | Household | The physical location of the recipient or their primary caregiver.<br>**HOUSEHOLD = LAST NAME or OTHER FAMILY IDENTIFIER** |
| | Contact | The recipient, also referred to as a Household Member.<br>**CONTACT = RECIPIENT** |
| | Order | All items ordered for a given recipient for a given pick-up date and location. |
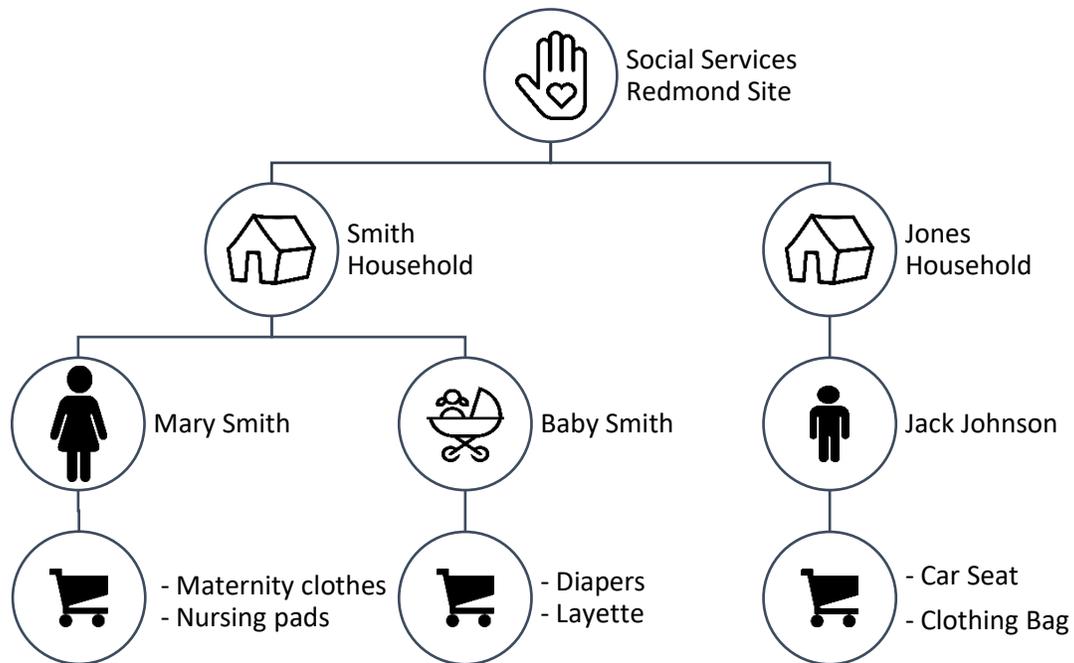


To place an order with EBC, providers must first register the household and recipient by creating new Household and Contact records in the database. This one-time registration enables providers to quickly place orders for existing clients.

Household, Contact, and Order records are private. They can be viewed and edited only by the provider who created them, other authorized members of their agency, and by the EBC Salesforce administrator. In general, providers working for the same agency at the same site (co-workers) will be able to see each other's records.

## Resources

Check out the Provider page of EBC's website for links to additional resources:
http://babycorner.org/agency-partners-4

- Ordering guidelines
- Pickup procedures
- Item catalog
- Training videos
- Contact information

## Logging In

Providers may not share login IDs or pass them on to new employees.
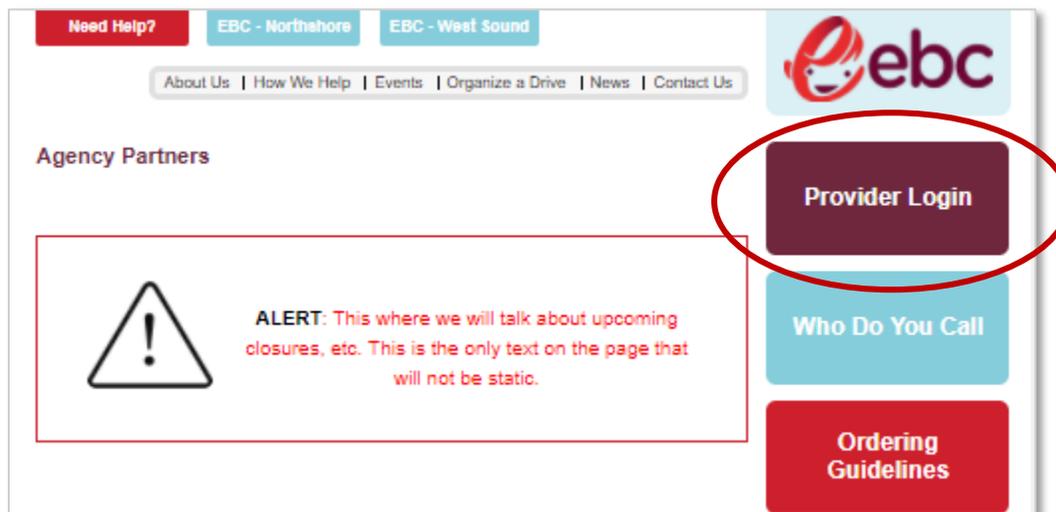*This is critical for us to remain in compliance with our software license agreement.*

**To deactivate a login ID or request a new one:**
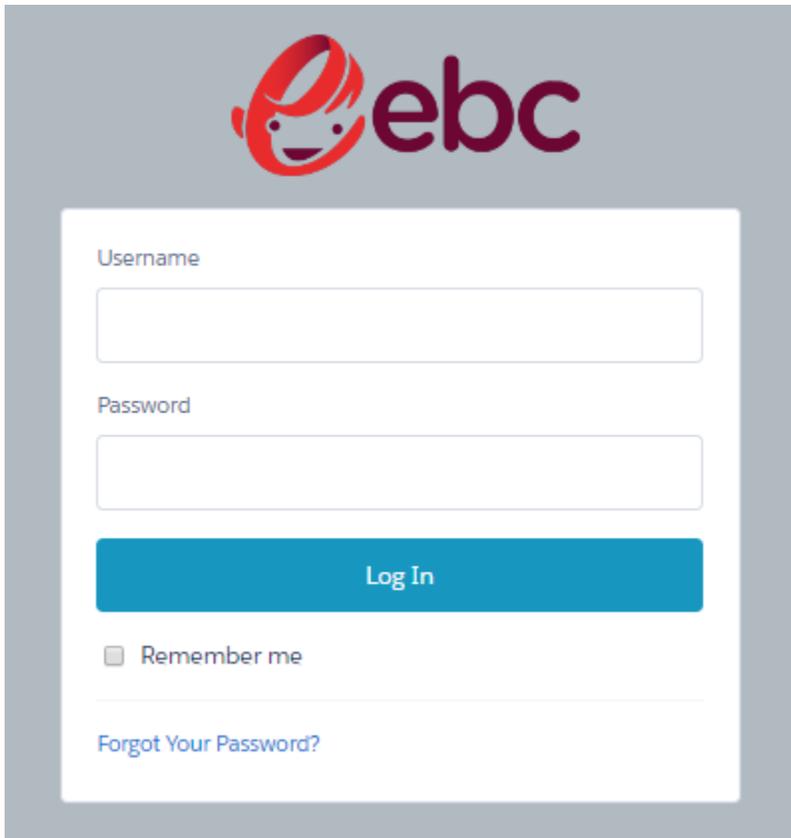
Contact EBC at ProviderReply@babycorner.org or call 425-372-7528.

**To access the online portal:**

1. Go to the Provider page of the EBC website and click on **Provider Login**.
   http://babycorner.org/agency-partners-4

2. Enter the username and password for your provider account and click **Log In**.
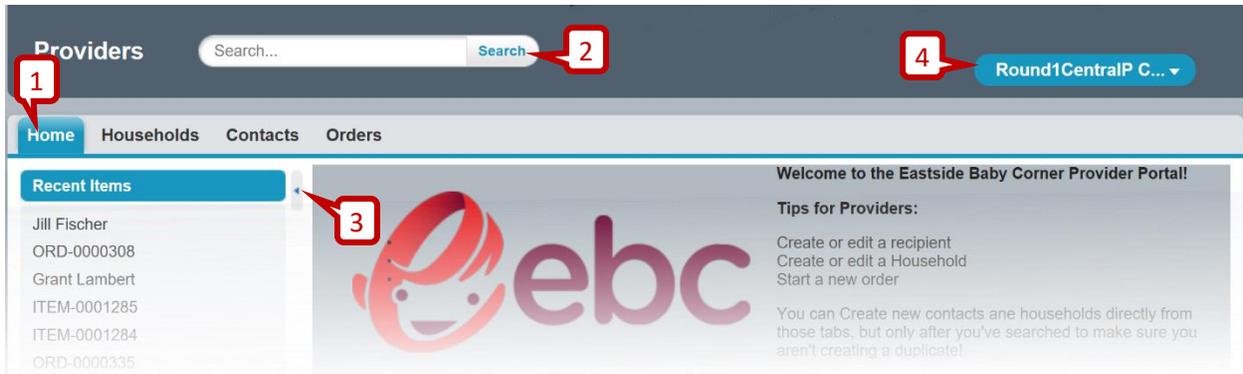


**To retrieve a password:**

Click **Forgot Your Password?** An automated message will be sent through Salesforce to the email address associated with your account.

**To retrieve a username:**

Contact EBC at ProviderReply@babycorner.org or call 425-372-7528.

# Basic Features

The Provider Portal provides customized access to the EBC database.



1. **Tabs**
   Select a tab to view Households, Contacts (recipients), or Orders associated with your account.

2. **Search Box**
   Search for Households and Contacts (recipients) directly. You may enter all or part of a name using the asterisk as a wildcard. Results are grouped by record type.

3. **Side Bar**
   Quickly link to recently viewed records and the EBC website.
   Collapse or expand the side bar by clicking on the arrow.

4. **User Menu**
   Change your password or log out.

> ⚠ Please DO NOT change your username, as this will break our reporting. If you need to change the user name, please email ProviderReply@babycorner.org.

# Managing Recipients

Each recipient has a unique Contact record that is associated with a Household. Providers can find, add, edit, and deactivate Household and Contact records.

 Before adding a recipient, you must first create a Household record for them.

## Find a Household or Contact

There are multiple ways to search for an existing Household or Contact record:

- Enter all or part of the Household or Contact name in the search box and click **Search**.
  Household names are the <u>last name</u> of the primary caregiver at the recipient's address.
  To enter part of a name, use the asterisk as a wild card (e.g. **Jo\*** for records that start with "Jo")

- Select the **Households** or **Contacts** tab to see a list of recently added Households or Contacts.

- On the **Households** or **Contacts** tab, select a view and click **Go!**.
  You can view reports of active or inactive Households or Contacts.
  Click on a letter to filter results by name.

Click on the Household or Contact name to open that record.

## Add a Household

Adding a household creates a Household record that is automatically associated with your provider account. A Household represents the physical location of the recipient or their primary caregiver.

> ⚠️ To avoid creating duplicate records, search for an existing Household before adding a new one.

1. On the **Household** tab, click **Create New Household**.



2. Fill in every field of the new Household record.

- The red line next to each field indicates that those fields are required. If they are left blank when you click **Save**, the record will not be saved and you will be prompted to fill in the required fields.

- You can use **Tab** to jump to the next field or **Shift + Tab** to go back to the previous field.

- If you press **Enter**, the system will try to save the record.

| Field | Description |
|---|---|
| Household Name | Enter the last name of the recipient's primary caregiver at this address. |
| Zip Code Lookup | For homeless recipients, enter the zip code where they generally reside. |
| Income Level | Select the Household's percentage of Average Median Income (AMI). To lookup AMI by year, state, county and family size go to https://www.huduser.gov/portal/datasets/il.html. |
| Homeless | Select **Yes** if homeless or in temporary housing, **No** if they have a permanent address, or **Unknown.** |
| Household Status | **Active** default. |

3. Click **Save**.
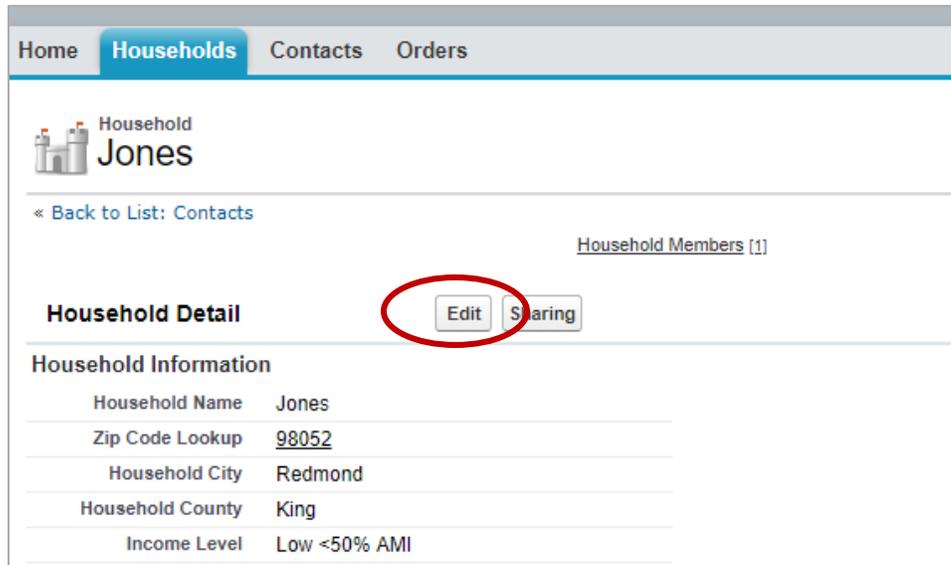   (The number of Household members will update automatically.)

If you have several households to add, click **Save & New** to save the current record and open a new one.

## Update a Household

If a recipient changes address, ***edit the existing Household record*** instead of creating a new one. This will keep it associated with the correct recipients and their past orders.

1. [Find and open the Household record](#).

2. Click **Edit.**



3. Update the relevant fields and click **Save**.


## Deactivate a Household

Once a household is created, it cannot be deleted by a provider. Instead, edit the Household record to change its status to "Inactive". When you deactivate a Household record, all of the household members (the Contact records associated with that Household) will automatically be deactivated as well. If you truly need to delete a Household record, contact [ProviderReply@babycorner.org](mailto:ProviderReply@babycorner.org).

1. [Find and open the Household record](#).

2. Click **Edit**.

3. From the **Household Status** drop-down menu, select **Inactive**.

4. Click **Save**.

## Add A Contact

Adding a contact creates a new Contact (recipient) record automatically associated with a Household.

> ⚠️ To avoid creating duplicate records, search for an existing contact before adding a new one.

1. Find and open the recipient's Household record to automatically connect the new recipient to the correct household.

2. From the Household record, scroll down to **Household Members** and click **New Recipient.**



3. Fill in all required fields.

- The red line next to each field indicates that those fields are required. If they are left blank when you click **Save**, the record will not be saved and you will be prompted to fill in the required fields.

- You can use **Tab** to jump to the next field or **Shift + Tab** to go back to the previous field.

- If you press **Enter**, the system will try to save the record.

> ⚠️ **For anonymous recipients:**
> You may enter numbers or other identifiers in the name fields and keep a private list of the keys so that each household and recipient is accurately tracked. Please *consistently use the same unique identifier* each time you order for the same child. This is critical for EBC's annual reporting.

| Field | Notes | Unborn Infants* |
|---|---|---|
| First Name | Enter the recipient's first name or unique identifier. | "Baby" if unknown |
| Last Name | Enter the recipient's last name or unique identifier (may be different from the Household name). | |
| Household | Automatically displays the Household associated with this recipient. | |
| Organization Name | Automatically displays the Organization associated with your account. | |
| Birth Month | | Month expected |
| Birth Year | | Year expected |
| Status | **Active** by default. | |
| Height | Enter height in inches using numbers only. | "19" |
| Weight | Enter weight in pounds using numbers only. | "7" |
| Clothing Size | Select the recipient's general clothing size. All clothing sizes are children's unless marked "MAT" for maternity. | 0-3 months |
| Shoe Size | Shoe sizes are 0-13 Child, 1-7 Youth, or 8-12 Adult. Example: 3Y means size 3 Youth. Half sizes may be indicated in the comment field when ordering shoes. See Appendix A to find sizes by foot measurements. | "0C" |
| Shoe Width | Medium by default. | |
| Race/Ethnicity | | |
| Gender | If transgender, enter the preferred gender of clothing the child identifies with. NOTE: Sizes vary by gender. (e.g., Men's size 7 = Women's size 8.5) | "Unknown" |
| Refugee/Immigrant | | |
| Limited English Proficiency | For young children, this is determined by the care giver's English proficiency. Select **No** if they speak English fluently. | |
| Military Service | | |
| Disability | As defined by your organization | |

* Update the Contact record once the baby is born.

4. Click **Save**.

If you have several recipients to add to the same Household, click **Save & New** to save the current record and open a new one that will be automatically associated with the same Household.

## Duplicate Client in the System

When creating a recipient account, the system looks at the recipient's first and last name, household, birth month and year to look for potential duplicates. In order to be able to serve the most children in our community, we are only to provide goods for a recipient through **one organization only**. Many of the items EBC distributes are purchased to make sure kids have ALL the essentials, including formula & baby food, diapers, wipes, car seats and Pack 'N Plays.

**A duplicate within your organization:**

In the event a possible duplicate was created within your own organization an alert will appear that includes a name and a link to the potential duplicate account. If it is a duplicate, please abort creating the account. If the account is created, you may be contacted by EBC.

**Contact Edit**  Save (Ignore Alert)  Save & New (Ignore Alert)  Cancel

1 Possible Duplicate Record Found

STOP! If duplicate is within your own site, a match will appear below. If no match appears the duplicate could be with another organization, go ahead and save record. We will contact you if there we have any questions.

🐣 Contacts

| Name | Clothing Size | Birth Year | Gender | Birth Month | Household | Contact Owner | Last Modified Date |
|------|--------------|-----------|--------|-------------|-----------|---------------|--------------------|
| Adam Bono | 3-6 mo | 2018 | Male | November | Bono | 12 Provider | 3/4/2019 11:00 PM |

**A duplicate outside your organization, but within the EBC database:**

In the event a possible duplicate was created outside your own organization, but within the EBC database (the recipient is being served by another organization) an alert will appear that this is a potential duplicate and you may be contact by EBC.

**Contact Edit**  Save (Ignore Alert)  Save & New (Ignore Alert)  Cancel

Possible Duplicate Records Found

STOP! If duplicate is within your own site, a match will appear below. If no match appears the duplicate could be with another organization, go ahead and save record. We will contact you if there we have any questions.

## Update a Contact

The ordering system uses the recipient's birth date to automatically calculate their current age, but providers need to verify and update current height, weight, and clothing and shoes sizes. This can be done by finding and editing the contact record directly or by updating the contact information from the ordering screen when placing an order.

**To edit a Contact record:**

1. [Find and open the recipient's Contact record](#).

2. Next to **Contact Details**, Click **Edit**.

3. Update any relevant fields and click **Save**.

**To update contact information when placing an order:**
Fill in the relevant fields at the top of the ordering screen and click **Update**.

**To update a contact's address**:

> You must find and edit the Household record that they are associated with.
> See Update a Household.

## Deactivate a Contact

Once a Contact is created, it cannot be deleted by a provider. Instead, edit the Contact record to change its status to "Inactive". If you truly need to delete a Contact record, send a request to ProviderReply@babycorner.org.

1. Find and open the Contact record.

2. Next to **Contact Details**, Click **Edit**.

3. From the **Status** drop-down menu, select **Inactive**.

4. Click **Save**.

# Orders

> ⚠️
> - All orders must be associated with a recipient. Contact EBC directly for bulk orders.
>
> - We accept just one order per recipient per week. To order more items for a recipient during the same week, edit the existing order instead of creating a new one.
>
> - The system does not currently support recurring orders. A new order must be created each time.

## Place an Order

1. Find and open the recipient's Contact record.
   If the contact cannot be found, create a new Household and Contact record.

2. From the recipient's Contact record, click **Create Order**.



> 💡
> If the Order page is wider than your screen, use the outer window (the internet browser's) scroll bar to navigate or resize the browser's font to zoom out:
>
> On a PC, hold down **Ctrl** and the **minus** sign at the same time.
> On a Mac, hold down **Command**, and the **minus** sign.
>
> Repeat these steps using the plus sign to zoom back in.

3.  If necessary, update the recipient's information:
    Enter the current height, weight, clothing and shoe size and click **Update**.

    The ordering system uses these values to validate certain items that have height, weight, or age restrictions and to designate the appropriate clothing and shoe sizes.
    Modifying these fields will automatically update the recipient's Contact record.



4.  Select a Pickup Date.
    The next available pickup date will display by default. You may use the drop-down menu to select a different pick-up date (within the next two weeks).

    *Once you hit Save Order you <u>cannot change the pick-up date</u>.  If the pick-up date needs to be changed, please **email webmaster@babycorner.org**.*

5. Click on a product category tab to filter the list of items.
   Items are listed in alphabetical order within categories.



**To quickly search for specific items:**

1. Select the **All** tab to display all items across categories.

2. Launch your browser's Find on Page feature.
   On a PC, hold down **Ctrl** and press **F**
   On a Mac, hold down **Command** and press **F**

3. Enter all or part of the item name in the search field.

All occurrences of that search term will be highlighted on the web page.

6. Select items to add to the order:

- Select the checkbox next to the item.
  (To remove an item from the order, deselect the checkbox)

- Enter any special requests in the item's **Comment** field.
  Examples: half shoes sizes, culturally sensitive items to exclude, gift preferences.
  Comments will print out on the item's label (up to 50 characters) *and can be viewed by the recipient.*

- Enter a quantity if applicable.
  Quantities will be "1" by default.

Special ordering instructions and restrictions related to the item will appear in the **Product Comment** column.

7. When you have finished adding items, review your order by selecting **View Ordered Item Only**. This will display your "Shopping Cart". <u>These items will not be ordered until you save the order.</u>



8. Click **Save Order**.
You may save the order multiple times to continue adding items as you wish.



9. Verify that the order was placed.
You should see a confirmation message above the Order Details. Click **Close** to close the confirmation message. The ordering screen will remain open for you to continue adding items as you wish.

If the order did not go through, you will see an error message here instead. Click **Close** to close the error message and revise the order as prompted.

If you selected an item that conflicts with the ordering guidelines (e.g. an infant device for an older child), an error message will appear under **Validation Message** next to the item explaining why the order could not go through.

## Emergency Orders

Emergency orders are available for families in crisis. If the deadline for placing orders has past, but you have an emergency, you can call EBC and get an emergency code that will allow you to place the order for the upcoming pickup date.  All orders must be placed into the system by 10:00am on Wednesday.

Please note that <u>the following items are the only items available for emergency orders</u>:

- Baby Food
- Bedding
- Car Seats
- Clothing Bundles & Layettes
- Diapers
- Formula
- Pack 'N Plays
- Wipes

**To place an emergency order:**

1.  Call EBC at 425-865-0234 to receive an emergency code.

2.  On the ordering screen, click the **Emergency Order** button.



3.  In the pop-up window, enter the emergency code and click **Validate**.
    If the emergency code is active, the order will automatically be assigned to the current pickup date.

## Enter Emergency Order Code

[                                        ]

**Validate**

4. Proceed with the order.

## Car Seat Orders

The ordering system uses the contact's height, weight, and type of seat belts the vehicle has to automatically assign the appropriate type of car seat.

**To order a car seat:**

1.  Follow the instructions for placing an order, taking extra care to enter the recipient's current height and weight and click **Update.**

2.  Select the **Car Seat** tab on the far-right of the order screen.
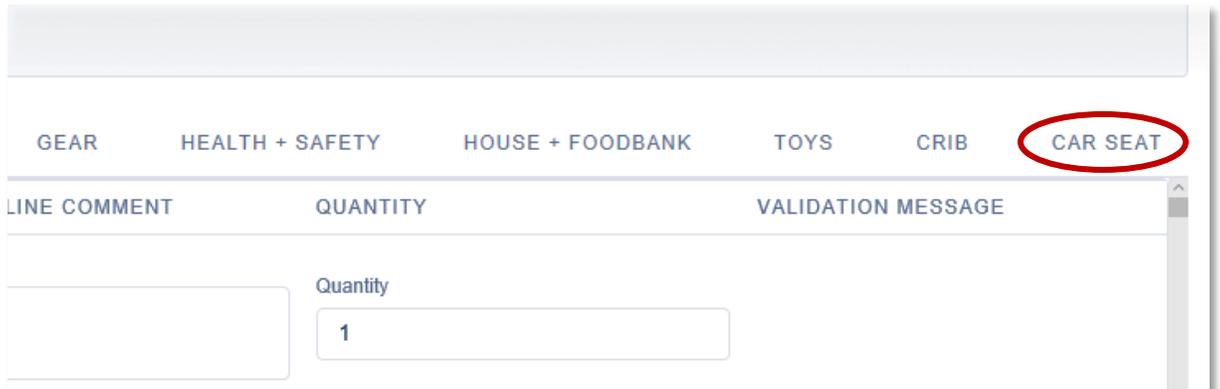


3.  In the pop-up window, select **Yes** or **No** to indicate whether or not the car has both lap and shoulder seatbelts.
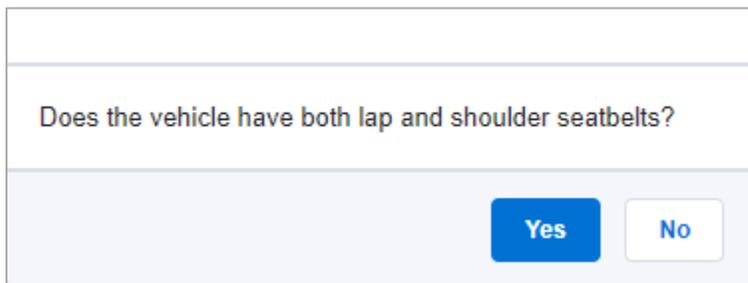


> ⚠ Car seat orders may take a minute to process, please wait and do not click **Yes** more than once, or multiple car seats may be ordered.

If the car does not have both lap and shoulder seatbelts, a car seat will not be added to the order and you will be prompted to call EBC at 425-856-0234 to talk to one of EBC's Child Passenger Safety Technicians. Click **OK** to exit.

Please contact EBC via Phone

[Ok]
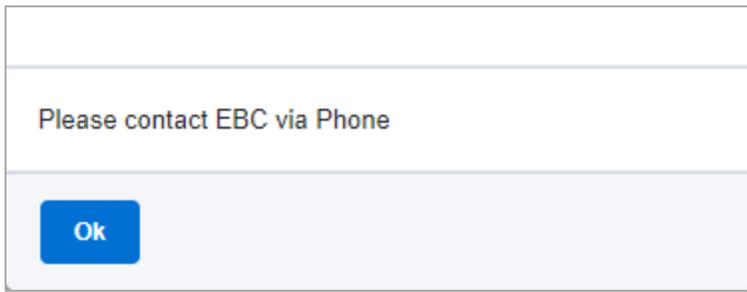
If the car does have both lap and shoulder seatbelts, the system will add the appropriate style of car seat onto the order and display a confirmation message. Click **OK**.

Item added to cart

[Ok]
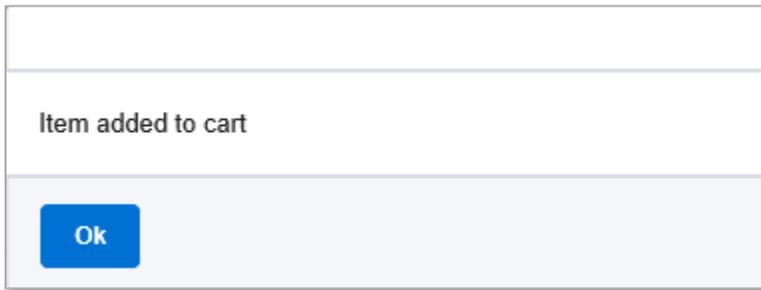
The car seat will now display on the order screen when you select **View Ordered Items Only**.

4. Continue to add items to your order or click **Save Order** to finish.

⚠ If you get an alert saying, "There are no matching product options available", call EBC for assistance at 425-865-0234.

## Find Orders

You can search for Orders in multiple ways:

- Enter the Order number in the search box and click **Search.**

- Find and open the recipient's Contact record.
  Scroll down to **Received Orders** to see the list of all orders associated with that recipient.

- On the **Orders** tab, select a view from the drop-down menu and click **Go!**.
  You can view reports of all open or locked orders this way.
  Sort the reports in ascending or descending order by clicking on a column heading (eg. Pickup Date or Recipient's first name).

In the search results, click **Edit** to the left of a result to open that Order record.

## View or Revise Items in an Order

You may view the items in an Order at any time, but only edit those whose status in "Open". Once the ordering cut-off time has passed (one week before the pickup date), the Order's status changes to "Locked" and any changes must be made by contacting EBC directly.

**To edit and order:**

1. Find and open the Order record.

2. Select **View Ordered Items Only** to display the ordered items or **View All Products** to see the full catalog of items.

3. Use the checkbox next to each item to add or remove items.

4. Click the **Save** button.

## Cancel an Order

Once created, orders remain in the system and cannot be deleted by a provider. If you need to cancel or reschedule an order, please call EBC at 425-865-0234.

# Frequently Asked Questions

For technical questions about the online ordering system, contact [webmaster@babycorner.org](mailto:webmaster@babycorner.org).

## Why can't providers share logins?

Our software license agreement with Salesforce (the platform for our ordering system) prohibits users from sharing logins. It is critical that we remain in compliance with this agreement, so we appreciate your adherence to this agreement, which is outlined in our MoU.

## What is an MOU?

The Memorandum of Understanding is an agreement that clarifies the commitments between EBC and our Agency Partners as we work together to distribute the items that children need. This document is usually signed by the Executive Director or Superintendent in an Agency or School District.

## Can recipients be anonymous?

Yes. If you need to keep the household or recipient's name anonymous, you can enter numbers or other identifiers in the name fields as long as you keep a private list of the keys and use them consistently so that each unique household and recipient is accurately tracked.

It is important that you provide real child information (age, height, weight, etc.) so the proper validation rules work.

## Why are we asking for so much demographic information?

EBC uses recipient and household demographic information to apply for grants that target specific groups and to generate community support and funding.

# Error Messages

I clicked **Create New Order** and got an error message: "You must first choose a recipient".

This error occurs when you try to create a new order from the Orders Tab. It prevents you from creating an "orphan" order that is not linked to Household and Contact records. To create a new order, open the recipient's Contact record and click **Create Order**.

# Appendix A: Shoe Sizing

Shoe sizes are 0-13 Children (C), 1-7 Youth (Y), and 8-12 Adult (A). If you do not know the child's shoe size, please take or ask for a foot measurement and use the tables below to determine the shoe size. Measure the foot from heel to toe without shoes on.

**Children & Youth Sizes**

| Shoe Size | Foot Length inches | Foot Length cm |
|-----------|--------|-----|
| 0 C | 0 | 0 |
| 1 C | 3 1/2 | 9 |
| 2 C | 3 3/4 | 9.5 |
| 3 C | 4 1/8 | 10.5 |
| 4 C | 4 1/2 | 11.5 |
| 5 C | 4 3/4 | 12 |
| 6 C | 5 1/8 | 13 |
| 7 C | 5 1/2 | 14 |
| 8 C | 5 3/4 | 14.5 |
| 9 C | 6 1/8 | 15.5 |
| 10 C | 6 1/2 | 16.5 |
| 11 C | 6 3/4 | 17 |
| 12 C | 7 1/8 | 18 |
| 13 C | 7 1/2 | 19 |
| 1 Y | 7 3/4 | 20 |
| 2 Y | 8 1/8 | 20.5 |
| 3 Y | 8 1/2 | 21.5 |
| 4 Y | 8 3/4 | 22 |
| 5 Y | 9 1/8 | 23 |
| 6 Y | 9 1/2 | 24 |
| 7 Y | 9 3/4 | 25 |

**Adult Sizes**

| Shoe Size | Women's inches | Women's cm | Men's inches | Men's cm |
|-----------|--------|------|--------|------|
| 8 A | 9 1/2 | 24.5 | 10 | 25.5 |
| 9 A | 10 | 25.5 | 10 1/4 | 26 |
| 10 A | 10 1/4 | 26 | 10 3/4 | 27 |
| 11 A | 10 3/4 | 27 | 11 | 28 |
| 12 A | 11 | 28 | 11 1/4 | 29 |

**Average shoe sizes by age.**

Please use these estimates with discretion, sizes can vary greatly between children.

| Child's Age | Girl | Boy |
|-------------|------|-----|
| Newborn | 0 C | 0 C |
| 3 mo | 1-2 C | 1-2 C |
| 6 mo | 3 C | 3 C |
| 12 mo | 4 C | 4-5 C |
| 18 mo | 5 C | 5-6 C |
| 2 yr | 6-8 C | 6-8 C |
| 3 yr | 8-9 C | 8-10 C |
| 4 yr | 10 C | 10-11 C |
| 5 yr | 11 C | 11 C |
| 6 yr | 12-13 C | 12-13 C |
| 7 yr | 12-13 C | 13 C - 1 Y |
| 8 yr | 1-2 Y | 2-3 Y |
| 9 yr | 2-4 Y | 4-5 Y |
| 10 yr | 4-6 Y | 6-7 Y |

Source: http://www.shoesize.com

# Appendix B: Average Median Income

## Average Median Income (AMI) Guideline

*Based on information from https://www.huduser.gov/portal/datasets/il.html*

### King County & Snohomish County

|  | Range is from 1 person - 8 people per household | Family of 4 |
|---|---|---|
| **Very Low < 30% AMI** | $22,500 – 42,400 | $32,100 |
| **Low < 50% AMI** | $37,450 - $70,650 | $53,500 |
| **Moderate < 80% AMI** | $56,200 - $105,950 | $80,250 |
| **Above Moderate > 80% AMI** | $56,200 - $105,950 | $80,250 |

### Kitsap & Pierce County

|  | Range is from 1 person - 8 people per household | Family of 4 |
|---|---|---|
| **Very Low < 30% AMI** | $17,400 - $42,380 | $25,100 |
| **Low < 50% AMI** | $28,950 - $54,550 | $41,300 |
| **Moderate < 80% AMI** | $46,300 - $87,300 | $66,100 |
| **Above Moderate > 80% AMI** | $46,300 - $87,300 | $66,100 |