Agency Profiles Overview

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Purpose of this document

This document demonstrates how to use the Agency Profiles function to help food banks group their Agencies by various user-defined and standard data fields.

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Purpose

Agency Profiles provide functionality in Ceres to increase the information the food bank can track about the Agencies they work with. Profiles are designed to help food banks group their Agencies by various user defined and standard data fields. See the Related Topics area for other new Agency Services/ Agency Management components.

- Agency Attributes
- Agency Approval Date and Agency First Order Date
- FBC Program Type
- Senate District, City Council District, Ward, and School District
- 501(c)(3) Fields
- Agency Training
- Agency Certifications

None of the information in these fields will automatically update the business rules in other fields, like UNC Activity Status or Agency Groups, but can track data that will allow for proper assignment decisions.

Ceres Object release 4.00.00 is required for the functionality described in this document.

Agency Attributes

A new Agency Attributes Table has been created where three different types of flexible attributes can be defined. The options are: Attributes, Affiliation, and Tiering.

Attributes are intended to be data values to see groups of Agencies by their capabilities - such storing frozen product, have small parking lot, etc. You can assign one or many to each Agency.

Affiliation is for grouping Agencies by religious affiliation or similar. You can assign one or many to each Agency.

Tiering is to track a food bank assigned value or values to group agencies into priority groups or similar. You can assign one or many to each Agency.

Accessing:

1. Attributes can be accessed from Navigate →Agency → Agency Attributes on the Agency Card. Select Home → New to create new attributes.

2. Update the fields as necessary

Type: Select an option for the type of Attribute you are creating. The options are: Attribute, Affiliation, or Tier

Code: Input a Code to identify the Attribute

Description: Enter a description for the Attribute

> NOTE: There is a count field of each Attribtue Type on the Information FastTab of the Agency Card. Clicking on each count will open up the Agency Attribute Card. T

Other New Agency Fields

1. On the General FastTab of the Agency Card the following fields were added

Agency Approval Date: Enter the date the Agency was approved as a member of the food bank.

Agency First Order Date: Ceres maintained field which will automatically updated based on the first order in the Agency Ledger Entries.

2. A new FBC Program Type field has been added to the Information FastTab of the Agency Card.

Information

Permit Web Orders:	☐
Agency Group Code:	30 ▾
Service Areas:	
Product Sources:	
Funding Sources:	
Client Records Maintained:	☐
UNC Food Bank ID No.:	▾
SDO:	☐
Food Bank Program:	☐
Statement URL:	
Geographical Location Code:	▾
Metropolitan Area Code:	▾
FBC Program Type:	ON-SITE FD

The FBC Program Type field has also been added to the FBC Agency Category Card; where the value is entered. The field is non-editable from the Agency Card.
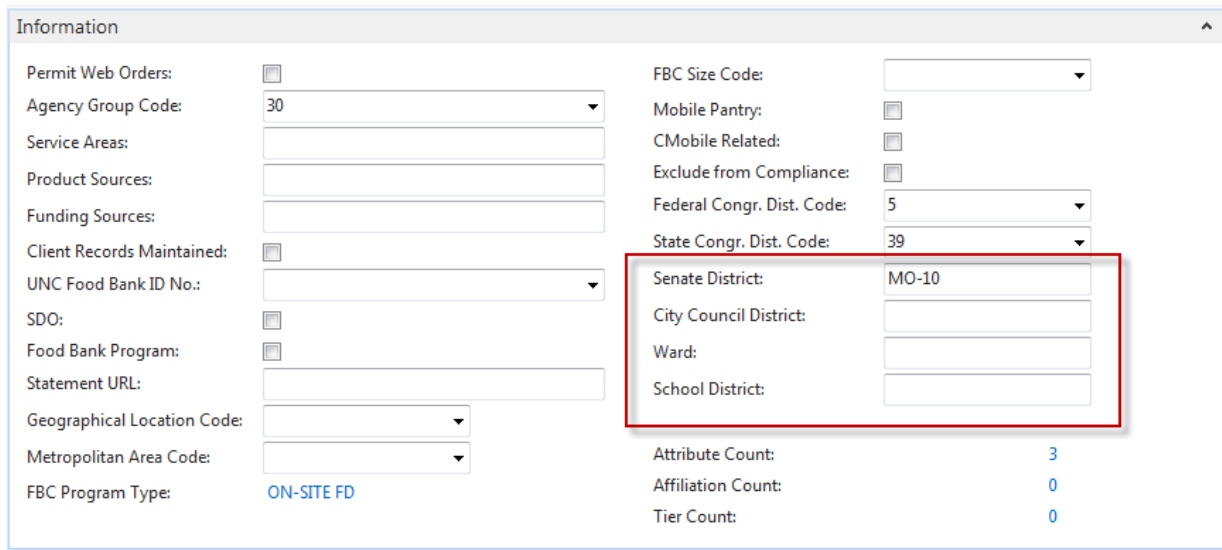
Select - FBC Agency Categories

HOME   NAVIGATE   ❓

New | View List | Edit List | Delete | Qualifiers | Show as List | Show as Chart | Notes | Links | Refresh | Clear Filter | Find

New | Manage | Process | View | Show Attached | Page

FBC Agency Categories ▾   Type to filter (F3)   Code   ▾ →

No filters applied

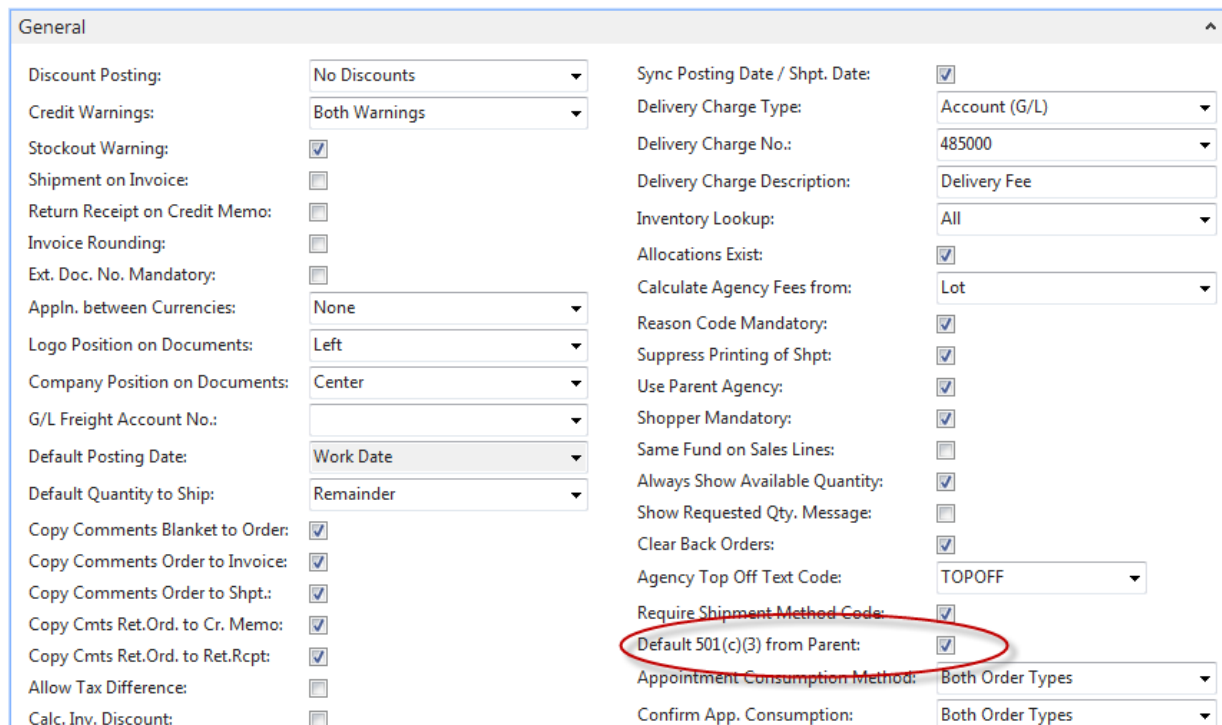| Code	Description	UNC Agency Category	Qualifiers	FBC Program Type
KIDS BACK	Kids Back Snack	CHILDREN	No	FD PANTRY
KIDS CAFE	Kids Cafe	CHILDREN	No	ON-SITE FD
KIDS IN KI	Kids in the Kitchen	CHILDREN	No	ON-SITE FD
KITCHEN	Soup Kitchens	SOUP KITCH	No	ON-SITE FD
KSDE	KSDE Backpack pilot	CHILDREN	No	FD PANTRY
MASS DIST	M... D......	PANTRY	N.	F. ....

3. Other fields that have been added to the Information Tab include Senate District, City Council District, Ward and School District. These fields are available at the Agency level only.

501(c)(3) Fields

1. On the Agency & Receivables Setup, a new field, called Default 501(c)(3) from Parent, has been added. If this field is checked, 501(c)(3) information will flow from the Parent Agency Card to the Agency Card and the 501(c)(3) fields on the Agency Card will not be editable.

2. On the Agency Card, a new 501(c)(3) FastTab has been added were to track 501(c)(3) information about the Agency. If Default 501(c)(3) from Parent on Agencies & Receivables Setup is checked, these fields will not be editable and will need to be updated at the Parent Agency level.

501(c)(3) No.: Enter the 501(c)(3) number for this Agency.

501(c)(3) Name: Enter the 501(c)(3) name for this Agency.

501(c)(3) Expiration Date: Enter the date when the Agency's 501(c)(3) status expires.

501(c)(3) Contact: Enter person to contact related to the Agency's 501(c)(3) status.

501(c)(3) Phone No.: Enter the phone number of the associated contact.

501(c)(3) Adv. Ruling End Date: Enter the date when the Agency's 501(c)(3) Advanced Ruling expires

501(c)(3) Adv. Ruling No.: Enter the 501(c)(3) Advanced Ruling Number

501(c)(3) Shared No.: Enter the 501(c)(3) Shared Number for this Agency.

501(c)(3) Shared: A checkmark in this field indicates that the 501(c)(3) status of the Parent Agency is being shared with this Agency. If shared all of the other related 501(c)(3) fields flow from the Parent Agency Card and are non-editable.

501(c)(3) Date Received: Enter the date the Agency's 501(c)(3) status was granted.

Church Qualifier Name: Enter the name of the Church this Agency qualified for non-profit status.

Letter of Umbrella: Enter the Letter of Umbrella this Agency is operating under for non-profit status.

Agency Training

1. Training information is recorded at the Agency level. Training can be tracked based on when it occurred or expires. To enter the information, from the Agency Card, click Navigate → Agency → Agency Training

2. Update the field in the Agency Training Page.

Training Code: Select a Code. To setup new Codes, click on the down arrow in the Training Code field and then select Advanced → Home → New. Input a Code and Description to identify the training.

Training Description: Automatically updates when a Code is selected.

Training Date: Enter the date of the training

Agency Certifications

1. Certification information is set at the Agency level. Certifications can be tracked based on expiration date. To enter the information, from the Agency Card, click Navigate → Agency → Agency Certifications
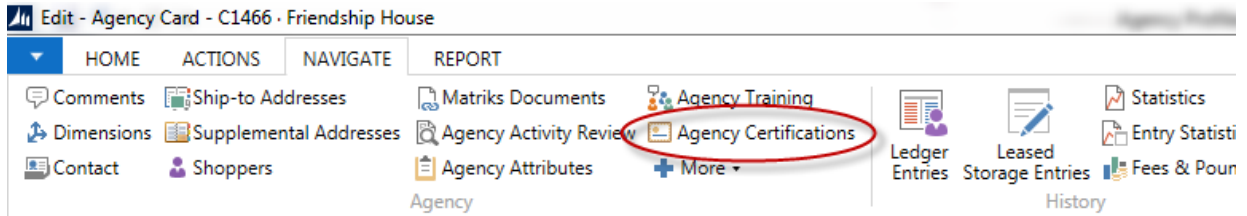
2. Update the fields in the Agency Certification Page.

Training Code: Select a Code. To setup new Codes, click on the down arrow in the Certification Code field and then select Advanced → Actiions → New. Input a Code and Description to identify the certification.

Certification Description: Automatically updates when a Code is selected.

Expirate Date: Enter the date the certification expires
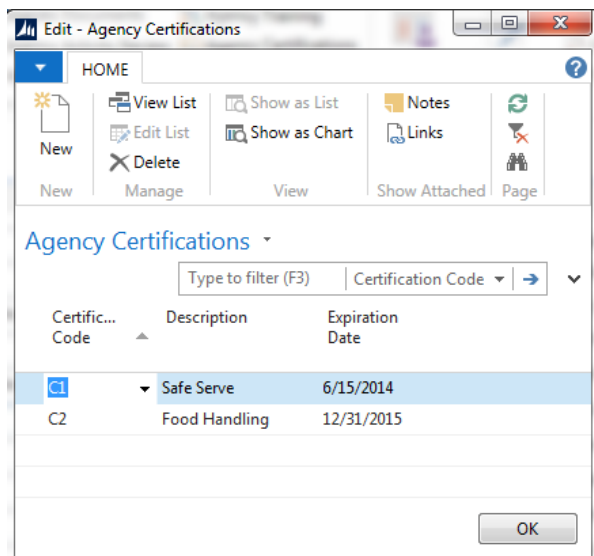
Related Topics:

1. Agency Overview
2. Parent Agency Overview
3. Agency Order Overview
4. Agency Questionnaires
5. Agency Groups and Qualifiers
6. Agency UNC Activity Status by Group