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Getting Started:

Understanding the process

This section will walk you through the general flow of the program – how and when information is collected, and how it's used. We're presuming that you're using the software both to control household registration (to prevent duplicate household registration, for example) and demographics, and to control product distribution. Other possible scenarios are discussed in the *Appendices*, in *Adaptive Uses of PEPbase*.

The Household Database: Tracking and knowing your guests

The Household database is really the primary key to the whole system, and is fairly rigid without extensive reprogramming. Essentially, the Household database is intended to keep track of the households using your service, ensuring that you know each household's size and composition (how many adults/ children, males/ females, etc.), and that multiple members of a household are registered as a single household, not as duplicate entries of the same household. From the very beginning of the process, with initial registration of a guest, PEPbase is set up to collect the information that will be needed for every step of your operation thereafter.

Collecting the basic information and checking for duplicate registrations

The basic information for each household is collected at the time of their initial registration. This information includes:

- first and last name;
- street number, street name, and apartment number¹;
- city, county, state, and zip;
- phone number(s) and e-mail;
- number of household members, by category (adult/ teen/ youth/ infant, and male/ female);

¹ You may have guests who are homeless; the program will not choke at not having a street address for a guest. However, as outlined in the *Host Functions* discussion in the *PEPbase in Routine Use* section, we do recommend that you enter "homeless" in the **Street** field.

- existence of allergies or medical conditions (incontinence, for us) requiring specialized product eligibility.

PEP base	
Households	
-- Enter basic information for new household --	
Please enter as much information as possible in the fields below. At the very least, the full name of the guest is required. Entering additional information helps ensure that there isn't already a record for this household, and will save time later on, since the information will eventually need to get entered.	
MAIN INFO	Name First: <input type="text"/> Last: <input type="text"/> Pantry-ID# 0
	Address Num: <input type="text"/> Street: <input type="text"/> Apt#: <input type="text"/>
	City: <input type="text"/> County: Dane ST: WI Zip: <input type="text"/> - <input type="text"/>
	ContactInfo Phone1: -- <input type="text"/> Phone2: -- <input type="text"/> Email: <input type="text"/>
<input type="button" value="Submit Check"/> <input type="button" value="Clear Form"/>	
Click the Submit button to check for duplicate entries, and bring up a form with potential matches to the entered data. If no potential duplicates are found, you will be able to continue entering the data needed to create an initial shopping list for this guest.	
Abandon all of this information, and return to the PEP Main Index	

The screen print above shows what the Host sees at the time of registration for a new guest.

The very *minimum* of information that should be entered at this time includes:

- First and last name;
- Street number and street name, with apartment number if any (if the guest is homeless, we recommend that you enter "homeless" in the **Street** field);
- Phone number if any.

Entering less than this information – and particularly entering less than the *full* first name and *full* last name – can result in erroneous creation of household records for households that are in fact already registered. (See the *Technical Specifications* section for the details of *what's* getting compared, and *how*, to better understand this.)

With this information entered, PEPbase automatically runs a check on *all* adult members of *all* households for a FirstName+LastName match, as well as a check across all existing households for a match on StreetNum+StreetName or a match on the last four digits of the telephone number. Any potential matches are presented to the Host as a double-check against re-registering an already existing household. Such potential duplication does *not* bar a household from being registered, even if there is duplicate information; it merely provides a warning

about *possible* duplication. There are many good and valid reasons that some information might be the same across two households – even unusual names are not necessarily unique; the household may be at a shelter address; a son may use his mother's phone number as the contact phone. See the *Coordinator Functions* section of this manual for more detailed discussion of this issue.

In this instance, we're going to use a made-up guest (actually a warped and skewed copy of PEP's coordinator, who's getting used to distorting herself in this fashion), Kristin Thomsen. We'll enter her information, click on the "Submit Check" button, and let PEPbase do its thing.

Once PEPbase has run its check for possible duplications and determined that this new guest is indeed new, PEPbase creates the record for that household, generating a (unique) ID for the household² and bringing up a screen to allow summary household information to be collected:

-- Enter basic information for new household --										
Please enter as much information as possible in the fields below. At the very least, the full name of the guest is required. Entering additional information helps ensure that there isn't already a record for this household, and will save time later on, since the information will eventually need to get entered.										
MAIN INFO	Name		First: Kristin		Last: Thomsen		Pantry-ID# 0			
	Address		Num: 1234	Street: Main Street		Apt#: 102				
			City: Somewhere	County: Dane		ST: WI	Zip: 53766			
ContactInfo		Phone1: 123-555-1234		Phone2: 321-555-1234		Email: kthomsen@sever.com				
ADDL INFO	Reg Date : 2009-03-24		ID Verified? No		Diffic Reading? No		Notes:			
	Addr Verified? No		Language? English							
SHOPPING INFO	<input type="radio"/> Use Household Values				<input checked="" type="radio"/> Set Manual Override Values					
Males....		...Females...	Males....		...Females...			
	Total	Incont	Total	Incont	Total	Incont	Total	Incont		
	0	0	0	0	0	0	0	0		
	Adults (18+)				0	0	0	0		
	Teens (12-17)				0	0	0	0		
Youth (4-11)				0	0	0	0			
Infants (0-3)				0	0	0	0			
Allergies In Household: No				Allergies In Household? No						
<input type="button" value="Print/Save"/> <input type="button" value="Clear Form"/>										
Click the Print/Save button to save the entered information, print a guest registration form, and generate an initial shopping list for the new guest. Abandon all of this information, and return to the PEP Main Index										

We strongly recommend that the Host also fill in the values for the number of household members in each category – adults, teens, youth, and infants, and males/females within each category – at this point. This isn't absolutely essential, but frankly we can't imagine that this information wouldn't be of benefit at this

² You won't actually see the Pantry-ID# at this point in the process, but it has been assigned, and will show up shortly.

stage whatever your pantry or service might be. If there are any special circumstances surrounding the family, those may also be noted. For instance, if Ms. Thomsen had difficulty reading, we'd flag that question with a "Yes," which would prompt staff to offer her assistance in filling out her form. If Ms. Thomsen spoke only French (one of the three languages we currently support; PEPbase allows up to ten non-English languages), we would select that "French" from the pull-down list under "Languages." (See *Dealing with special circumstances* in the *PEPbase in Routine Use* section for more detail on these flags.)

With this information filled in, the screen for our sample guest, Kristen Thomsen, will look like the following:

-- Enter basic information for new household --					
Please enter as much information as possible in the fields below. At the very least, the full name of the guest is required. Entering additional information helps ensure that there isn't already a record for this household, and will save time later on, since the information will eventually need to get entered.					
MAIN INFO	Name		First: Kristin	Last: Thomsen	Pantry-ID#: 0
	Address		Num: 1234	Street: Main Street	Apt#: 102
	ContactInfo		City: Somewhere	County: Dane	ST: WI
Reg Date : 2009-03-24		Phone1: 123-555-1234	Phone2: 321-555-1234	Email: kthomsen@server.com	
ADDL INFO	ID Verified? Yes <input type="checkbox"/> No <input type="checkbox"/>	Diffic Reading? No <input type="checkbox"/> Yes <input type="checkbox"/>	Language? English <input type="checkbox"/>	Notes: Ms. Thomsen is expecting a new baby in October, please update status at next visit. (3/24/09, cjt)	
SHOPPING INFO	<input type="radio"/> Use Household Values <input checked="" type="radio"/> Set Manual Override Values				
Males.... Total Incont Total Incont		...Females... Total Incont Total Incont		
	0	0	0	0	Adults (18+)
	0	0	0	0	Teens (12-17)
Last Visit	0	0	0	0	Youth (4-11)
	0	0	0	0	Infants (0-3)
Allergies In Household: No					Allergies In Household? No <input type="checkbox"/>
<input type="button" value="Print/Save"/> <input type="button" value="Clear Form"/>					
Click the Print/Save button to save the entered information, print a guest registration form, and generate an initial shopping list for the new guest.					
Abandon all of this information, and return to the PEP Main Index					

You will note that, in addition to the information that the Host entered to generate this record, the Host has also noted that Ms. Thomsen's ID was verified, but apparently her photo ID does not show her correct address, so the Addr Verified box is still "No." (How rigorously your agency demands verification of guest identification and address is of course set by your policies; these flags will help ensure that appropriate follow-up action is taken for households who did not have proper identification at the time of registration.) The Host has also made a comment in the Notes field that Ms. Thomsen is pregnant, with the baby due in October.³ There are currently six people in the household: Ms. Thomsen,

³ The Host has also dated and initialed the comment, a practice we recommend; this makes it much easier to know whether in fact a comment is still in effect, or whether it can by now be safely ignored and deleted. See

her [male] partner, two boys and one girl between 4 and 11 years of age, and one boy who is three years or younger. The Host has correctly entered this information in the “**Set Manual Override Values**” section of the **SHOPPING INFO** section of the screen. Since the Host does not as yet have anything more than counts for the members of Ms. Thomsen’s household – that is, the Host has no date of birth information – this is the appropriate place for this information – and indeed it’s the only place that the Host can enter the information. The counts under the “**Use Household Values**” side of **SHOPPING INFO** will be filled in by the computer using the Date of Birth information that will be collected shortly. To reflect that fact, the “**Set Manual Override Values**” is highlighted (on the actual computer screen, this highlight is a brighter pink, not darker gray, as it shows on the printed pages of this manual.)

So, at this point the computer does not have exact Date of Birth information for the household – but because the Host entered the correct numbers in the **Set Manual Override Values**, it does have the information it needs to generate Ms. Thomsen’s shopping list, and of course all of the information that you might need for demographic reporting. There are no household members with allergies or who are incontinent (the factors that we track for; the flags you’re using may be different), so there are no special conditions that must be accommodated. Since Ms. Thomsen is a new guest, she has no shopping history, so all products for which the household and its members qualify are available to her. (We’ll talk more about the shopping list and its generation and use in *Shopping Lists...*, page 16 of this section.)

Collecting full household information:

Name and DOB for all household members

The household information that has been entered to this point will continue to be effective at generating the appropriate quantities in future shopping lists – although the exact products available to Ms. Thomsen for any visit will also be determined by her shopping history. Unless we want to submit Ms. Thomsen to a two-minute quiz every time she visits, however, we will need to gather the date of birth information for the entire household. With this information entered in

both *PEPbase in Routine Use* and the *Adaptive Uses of PEPbase* in the *Appendices* for more guidelines on using the Notes field.

the database, the PEPbase software can automatically recalculate how many Infants, Youths, Teens and Adults in Ms. Thomsen's household, and how many of each are male or female, every time Ms. Thomsen visits. (This does presume that Ms. Thomsen's household doesn't change because stepchildren moved in, an aunt or uncle joined the household, etc. It's always worth a quick question even when returning guests register – "Any changes to the household?")

We do *not* recommend that you collect all of this information at the time of registration. The time required to collect name, gender, and date of birth for every member of every household is simply too great. Rather, we recommend that you collect the information using the Cover Sheet that PEPbase automatically generates on your behalf.

Now that the Host has finished collecting and has entered the information about Ms. Thomsen's household, he/she clicks on the **Print/Save** button at the bottom of the screen. A Cover Sheet will then be generated for that household, which can be given to the guest to collect the remainder of the information for the household. The screen shot below shows a cover sheet from the Personal Essentials Pantry; the specific cover sheet that will print out at your agency will reflect the text blocks that your agency has specified within its version of PEPbase. (See the *Coordinator Functions* and *Technical Specifications* sections of this manual regarding customizing agency information.)

PERSONAL ESSENTIALS PANTRY ELIGIBILITY CERTIFICATION				
Participation in the Zion Church Pantry is voluntary. Personally identifiable information collected is required for participation and will be used for that purpose only. Please Print All Information				
Name - Last Thomsen		First Kristin		Pantry ID# 35
Street Address (With Apartment Number) 1234 Main Street #102				
City Somewhere	County Dane	State WI	Zip Code 53766 -	
Phone Number (1) 123-555-1234	Phone Number (2) 321-555-1234	E-mail kthomsen@server.com		
List All Household Members (use reverse side for additional members, if needed)				
Full Name	Date of Birth	Gender	Allergies?	Pantry Notes
Kristin Thomsen				

You'll notice that we can now see the Pantry ID# that has been assigned to Ms. Thomsen's household – she's ID#35 – and that all of the information that the Host entered about her address and phone have been recorded.

This form can now be printed out (in fact, the program is going to presume that you'll be printing it, and will automatically bring up the system Print Dialogue box to confirm the print; see the *Generating the Shopping List in PEPbase in Routine Use* for more detail). This Cover Sheet will provide Ms. Thomsen with space to write in the names, dates of birth, and genders of all of the members of her household. (The form provides space for 12 household members. If a particular household has more than 12 members, they can be asked to use the reverse side of the cover sheet. The PEPbase data structure will allow up to 24 household members). The Cover Sheet is also set up to provide Ms. Thomsen with a chance to see and read over the policies of your agency: in this case, since our example was generated by the Personal Essentials Pantry, *our* policies are shown at the bottom of the page. (This can and should be changed for your agency; see the *Coordinator Functions* section.)

I hereby certify that:		
<ul style="list-style-type: none"> • My monthly income is at or below the federally approved DCFS limits for participation in this program for the number of people in my household as indicated on this form. • All shopping visits, regardless of who is doing the shopping, will be registered to the Primary Contact person for my household. • Items are distributed based on household size, expected product duration, and availability. • I will use the commodities received for household consumption only. • I release Zion Evangelical Lutheran Church and any person distributing commodities from liability resulting from receipt of these items. • I understand that making false certification may result in not being to use the Zion Church Home/Personal Essentials Pantry in the future. • I am only able to pick up items for my household and not acquaintances or relatives. • Rules for acceptance and participation in the program are the same for everyone without regard to race, color, religion, national origin, age, sex or disability. 	Household Size	Household Monthly Income
	1	No more than \$1,476
	2	No more than \$1,978
	3	No more than \$2,481
	4	No more than \$2,984
	5	No more than \$3,486
	6	No more than \$3,989
	7	No more than \$4,491
	8	No more than \$4,994
	9	No more than \$5,497
	10	No more than \$6,000
More	<i>Please see a host</i>	
Signature:		

Dealing with a returning guest

We'll presume for the purposes of this discussion that Ms. Thomsen will fill this form out and return it as part of your agency's normal process, and that at some point in the near future, probably as part of the background work at your agency, the information from the form will be entered into her record. For the purposes of this discussion, we're going to skip that stage, simply assume that Ms. Thomsen has once again come in. Therefore, we need to find Ms. Thomsen

as a *returning* guest (although if she – or her partner, Jonathan – should absent-mindedly say “No” when the Host asks “And have you been here before?” PEPbase will still find this household, even if the Host accepts the answer and assumes that Ms. Thomsen is a new household).

Because of the way that PEPbase checks through its records, it actually makes more sense when looking for a returning guest to use *minimal* information (see the *Technical Specifications* section for more detail on the reasons for this). And, as you can see, our host is doing just that:

Households					
-- Enter search information for returning household guest --					
Please enter enough information to identify the returning guest. Although a search can be performed on any of the following fields, you should try and use the first and last name of the guest, along with the street number, street name, or phone number. The more/better information you can enter, the fewer possible matches you will need to select from. If no matches (or no correct matches) can be located, you'll have the option to change (or clear out) some of the fields, to broaden your search parameters.					
MAIN INFO	Name	First: Kr	Last: Thom	Pantry-ID#: 0	
	Address	Num: <input type="text"/>	Street: <input type="text"/>	Apt#: <input type="text"/>	
		City: <input type="text"/>	County: Dane	ST: WI	Zip: <input type="text"/> - <input type="text"/>
ContactInfo	Phone1: --	Phone2: --	Email: <input type="text"/>		
<input type="button" value="Submit Check"/> <input type="button" value="Clear Form"/>					
Click the Submit button to search for records matching this information and to display them for you to select from. If no matches are found, you will be able to change your search, or switch over to entering this as a new household instead of a returning guest.					
Abandon all of this information, and return to the PEP Main Index					

When the Host clicks on the **Submit Check** button, the PEPbase software will look for any household that meets these criteria...

If needed, you can override the values for household size and composition for this shopping trip. If you do, please ensure that you print out an update-registration form so the updated information can be gathered for later entry. Also, if there are any changes to the guest's address, phone number, etc, please print out a form so the records can be updated. If it's convenient, changes and corrections can be made directly on this screen, and will be reflected both on the update-registration form that's printed, and in the saved record for the guest.						
MAIN INFO	Name	First: Kristin	Last: Thomsen	Pantry-ID#: 35		
	Address	Num: 1234	Street: Main Street	Apt#: 102		
		City: Somewhere	County: Dane	ST: WI	Zip: 53766 - <input type="text"/>	
ContactInfo	Phone1: 123-555-1234	Phone2: 321-555-1234	Email: kthomsen@server.com			
ADDL INFO	Reg Date : 2009-03-24	ID Verified? <input type="checkbox"/> Yes <input type="checkbox"/> No		Diffic Reading? <input type="checkbox"/> No <input type="checkbox"/> Yes		
	Addr Verified? <input type="checkbox"/> No <input type="checkbox"/> Yes	Language? <input type="checkbox"/> English <input type="checkbox"/> Other		Notes: Ms. Thomsen is expecting a new baby in October; please update status at next visit. (3/24/09, cjt)		
SHOPPING INFO	<input checked="" type="radio"/> Use Household Values <input type="radio"/> Set Manual Override Values					
	...Males...		...Females...			
	Total	Incont	Total	Incont	Adults (18+)	
	1	0	1	0	1	0
	0	0	0	0	Teens (12-17)	
	2	0	1	0	2	0
1	0	0	0	Youth (4-11)		
Allergies In Household: No				Allergies In Household? <input type="checkbox"/> No <input type="checkbox"/> Yes		
<input type="button" value="Save Household"/> <input type="button" value="Print/Save"/> <input type="button" value="Reset Changes"/> <input type="button" value="Clear Form"/>						
Click the Save Household button to save the entered information and generate a shopping list. Click the Print/Save button print an update-registration form in addition to saving any changes, and generating a shopping list.						
Abandon all of this information, and return to the PEP Main Index						

...and Ms. Thomsen's household appears.

The **Use Household Values** fields are now highlighted; and since it's only been a few weeks since Ms. Thomsen registered, they of course still show the same values as the **Set Manual Override Values** that were entered at the time of registration.⁴ A year or so from now, these values would automatically change, since Robert would now be four years old (and therefore no longer an infant); and they would again be automatically updated when Leland turned 12, and then when Richard and Ann in turn changed from Youth status to Teen status.

Please note that our assumption is that, except for special circumstances, we presume that the **Set Manual Override Values** *will be ignored* once the Household date of birth information has been entered. The whole point of *having* the **Use Household Values** section is so that you don't have to keep re-interrogating the household as to the ages of its members, but can simply let PEPbase keep track of them over time. Unless the date of birth information hasn't been gathered or entered, or there are special circumstances, *ignore* the **Set Manual Override Values!** (And that's my one allowable exclamation point for this project, so I promise not to do any more yelling.)

The Host will probably not need to refer to the information on the specific household members, but it's available in case there is any confusion about the household, by going down one "screen" using the elevator bar:

SHOPPING INFO	Use Household values				Set Manual Override values			
	...Males...		...Females...		...Males...		...Females...	
Last Visit 0000-00-00	Total	Incont	Total	Incont	Total	Incont	Total	Incont
	1	0	1	0	1	0	1	0
	0	0	0	0	0	0	0	0
	2	0	1	0	2	0	1	0
	1	0	0	0	1	0	0	0
	Allergies In Household: No				Allergies In Household? No <input type="button" value="v"/>			
<input type="button" value="Save Household"/> <input type="button" value="Print/Save"/> <input type="button" value="Reset Changes"/> <input type="button" value="Clear Form"/>								
Click the Save Household button to save the entered information and generate a shopping list. Click the Print/Save button print an update-registration form in addition to saving any changes, and generating a shopping list.								
Abandon all of this information, and return to the PEP Main Index								
ID	First Name	Last Name	Active?	Birth Date	Gender	Allergies?	Incont?	
67	Kristin	Thomsen	Yes	1955-01-01	Female	No	No	
68	Jonathan	Thomsen	Yes	1954-02-23	Male	No	No	
INFO								

⁴The term "override" refers to the fact that these values can be altered to reflect exceptional circumstances. If Ms. Thomsen's son Leland, for instance, needed deodorant, the override values would be changed to reflect one male teenager and one male youth, and PEPbase would be directed to use Override values rather than Derived values. We don't spend too much time worrying about this, however; that's what PEPbase is for. See *PEPbase in Routine Use* for more detailed discussion of this.

With the **Notes** field showing a reminder that Ms. Thomsen is expecting a baby in October, even if she forgets to tell the Host, the Host will probably ask about the baby starting in mid- to late September. Once the baby is born, the **Set Manual Override** values will be changed to reflect an additional infant, and the Host will use the **Print/Save** button to print out a new Cover Sheet. The infant's date of birth can then be obtained; if there are other household changes, they can be logged as well. In this way, Ms. Thomsen (and we) can be assured that we have her most current information, and that the products that show up on her shopping list (if your agency is using the shopping list capability) are indeed the products relevant to her household's needs.

Misregistration problems:

Entering a "new" household already in the database

Although we didn't mention it up above (because we wanted to keep things simple), PEPbase in fact did think that Ms. Kristen Thomsen might already be registered. When the host clicked on the "Submit Check" button a cautionary screen appeared:

The screenshot shows the PEPbase interface for managing households. At the top, the PEPbase logo is displayed. Below it, the title "Households" is centered. A table titled "-- Check POTENTIAL matches of pre-existing households --" lists four potential matches with columns for Select, Household Name, Address, and Phone(s). Below the table is a "Use Selected" button and a note: "Please check with the guest to see whether he or she belongs to any of the already existing household records listed above. If so, select the record, and click on Use Selected to go to the 'returning guest' section, make any changes that are needed, and print a shopping list for the guest." Below this is another section titled "-- Enter basic information for new household --" with a note: "Please enter as much information as possible in the fields below. At the very least, the full name of the guest is required. Entering additional information helps ensure that there isn't already a record for this household, and will save time later on, since the information will eventually need to get entered." At the bottom, there are input fields for Name (First: Kristin, Last: Thomsen) and Pantry ID# (0).

Select	Household Name	Address	Phone(s)
<input type="radio"/>	Molly Campbel	1234 Main Street #D	608-987-6543 // --
<input type="radio"/>	Joyce Campbell	826 Oak Street	608-873-1234 // - -
<input type="radio"/>	Alan Sorensen	9300 Russell Ave S #123	952-476-1234 // - -
<input type="radio"/>	Christine Thompson	1234 Main Street #6	608-123-4567 // --

Please check with the guest to see whether he or she belongs to any of the already existing household records listed above. If so, select the record, and click on Use Selected to go to the 'returning guest' section, make any changes that are needed, and print a shopping list for the guest.

-- Enter basic information for new household --

Please enter as much information as possible in the fields below. At the very least, the full name of the guest is required. Entering additional information helps ensure that there isn't already a record for this household, and will save time later on, since the information will eventually need to get entered.

Name: First: Kristin Last: Thomsen Pantry ID#: 0

In this case, the potential matches were because Ms. Thomsen's phone number ended with "1234" – as did the phone numbers of Joyce Campbell and Alan Sorensen. If there had been another household who had any adult member whose first name began with "Kr" or whose last name began with "Thom," those households would also have been listed. By presenting such potential duplicates with their street number and phone number listed, it's easy for both the Host and

the guest – in this case, of course, Ms. Thomsen – to determine whether in fact Ms. Thomsen is a member of any household already listed in the database.

Concluding remarks

These procedures aren't perfect; it's still possible to get duplicate registrations of a household, and guests may still forget to inform you when a household member moves out or a new member moves in, or even that a new baby has been born. However, the Household database can provide your agency with a reasonable assurance that you have up-to-date information on the households; it can provide you with the flexibility to handle common "exceptions to our rules" conditions; and it can help prevent proliferation of duplicate registrations. And, in conjunction with the product definition capabilities outlined below, it can allow you to be much more flexible in your support while still maintaining adequate control of your inventory.

Even if you use none of the capability to link household information and product definitions to product guest shopping lists, the Household database will probably be a great timesaver just in its ability to prevent duplicate registrations and to summarize household age and genders information.

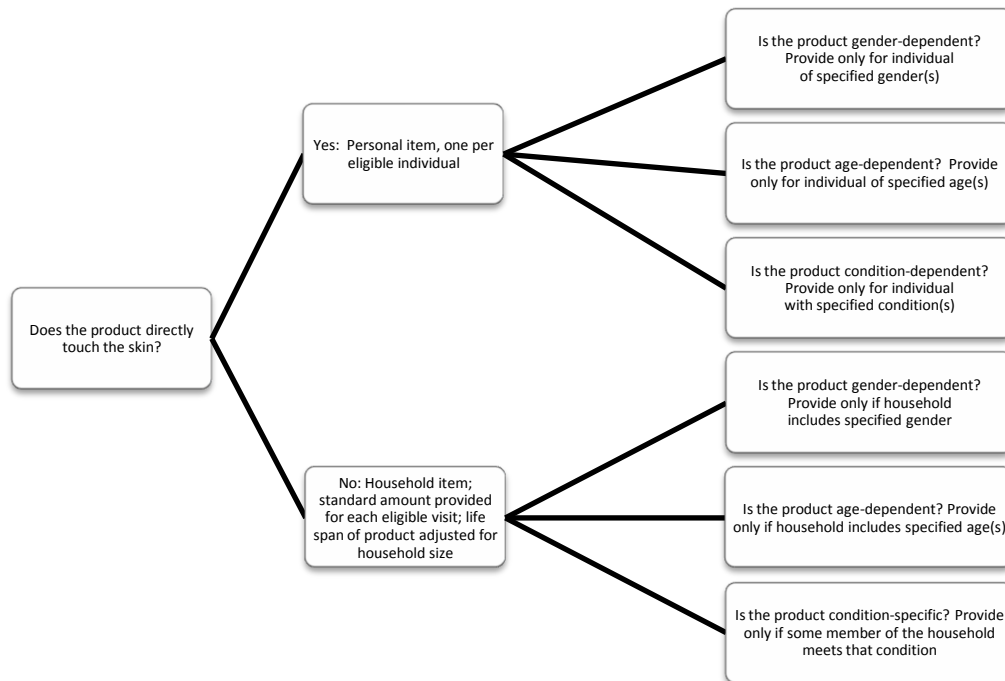
Product Definition

The process of defining the products that your pantry or agency provides within the PEPbase Product database is handled at the Coordinator levels, so that process is not described in detail here. For the purposes of our discussion within this section – just understanding the flow of PEPbase – we'll look instead at how the Household database and Product database interact, using the product definitions that we use here at the Personal Essentials Pantry. We've supplied a page within the *Coordinator Functions* section of this manual for your agency Coordinator to record whatever decision tree is being used within your agency; if you have that section in your version of the manual, you might want to put a finger or a bookmark in that section to make it easy to flip back and forth between here and there for this discussion; if not, you might want to ask your Coordinator for a copy of that page.

Eligibility Rules for Products

As we've mentioned before, the focus of the Personal Essentials Pantry is products for personal and household hygiene. These products are very different from food products in terms of who is eligible for what, and how long the expected product lifetime is. With the exception of infants or households with food allergies, all food can pretty much be assumed to be okay for all households. Suitability of personal and household hygiene products, however, differs by age, gender, and specific conditions.

At first blush, it would seem that the rules for who can get what, and how often, would be fairly complicated. However, they can be diagrammed into a fairly simple paradigm, as shown in the chart below.



Determining Product Eligibility

Is the product for general household use, or for use by a single individual?

The first question is whether a given product can be provided for use by the entire family, or whether it is a product that needs to be provided for each eligible individual.

In general, products that do not directly touch the skin – or where the portion that *does* touch the skin is dispensed and separated from the bulk of the

product – are dispensed to the entire household. These products include toilet paper, laundry soap, Q-tips, body soap, shampoo, etc.

These products are packaged in standard amounts, and dispensed in those standard amounts *only*. No household ever gets more than that standard amount at any given visit; however, larger households may request that standard amount more often.

Products that *do* touch the skin directly – most deodorants, toothbrushes, combs, razors, etc. – are provided one per eligible individual. The lifespan, or required time before these products will again be dispensed, is a constant for each product, since only one individual will be (or is presumed to) use the product.

Eligibility by age, gender, medical condition

Rules also govern whether products are available:

- for both genders, or for only men/boys or women/girls,
- for all ages, or for only certain age ranges;
- for all individuals, or only individuals with certain conditions (allergies or incontinence are the two major conditions we track).

Product Life Span (“Duration”)

While food pantries traditionally have worried too much about the lifespan of their products once they're dispensed (obviously, “sell by” dates are of great concern), the various products that the Personal Essentials Pantry carries have *very* different life spans. For instance, toilet paper will be used up more rapidly than toothpaste, and toothpaste more rapidly than deodorant. Life span also differs not just by product type, but by household size: the larger the household, the more quickly a product will get used up. Because of this, the product definition parameters include information as to the expected duration for the product, which in turn determines the frequency with which that product can be requested by a given household.

Of course, products that are supplied per individual household members always have a constant life span across household size, because there will never be (well, there *should* never be) more than one person using them. However, the lifespan for those products will still vary; hairbrushes and combs are fairly durable, while

toothbrushes should be replaced every six months; women's sanitary protection products will need to be provided more often than women's deodorant.

As an example, let's take a look at the Product Definition that the Personal Essentials Pantry has set up for three products – dish soap, baby powder, and women's deodorant. Notice particularly the differences in **Properties** and **Duration/Frequency**.

Dish Soap

Pantry Product Definition / Editing				
You are currently editing a product record. You need to save or abandon it before you can select a different record to work on.		dish soap		
Print All Products		Use Selected		
Product	Location	Name(s)	Properties	Duration/Frequency
ProdID: 4 Active: Yes	Shelf: 3 Bin: 1	English dish soap Spanish jabÃn para platos Hmong xum npum ntxuav tais di French savon de vaisselle	Personal: No For Gender: Both For Age: All Hypo-allergenic? No For Incontinence? No	#Days For A Household Size Of 1-2 3-4 5-6 7-8 9- 11- 13- 30 27 24 21 10 12 1 Category Name / Prod-Mult (if applicable) Name X

Baby Powder

Pantry Product Definition / Editing				
You are currently editing a product record. You need to save or abandon it before you can select a different record to work on.		baby powder		
Print All Products		Use Selected		
Product	Location	Name(s)	Properties	Duration/Frequency
ProdID: 47 Active: Yes	Shelf: 17 Bin: 3	English baby powder Spanish polvo de beb�e Hmong tshuj hmoov (me nyuam French poudre pour le bebe	Personal: No For Gender: Both For Age: 0-3 Hypo-allergenic? No For Incontinence? Yes	#Days For A Household Size Of... 1-2 3-4 5-6 7-8 9-10 11-12 13+ 45 40 35 30 25 20 15 Category Name / Prod-Mult (if applicable) Name X 1

Woman's Deodorant

Pantry Product Definition / Editing				
You are currently editing a product record. You need to save or abandon it before you can select a different record to work on.		deodorant (woman's)		
Print All Products		Use Selected		
Product	Location	Name(s)	Properties	Duration/Frequency
ProdID: 24 Active: Yes	Shelf: 8 Bin: 2	English deodorant (woman's) Spanish desodorante (de mujer) Hmong tshuj ua kom txhob tsw French deodorant (femme)	Personal: Yes For Gender: Female For Age: 12 plus Hypo-allergenic? No For Incontinence? No	#Days For A Household Size Of... 1-2 3-4 5-6 7-8 9- 11- 13+ 60 60 60 60 10 12 60 60 60 Category Name / Prod-Mult (if applicable) Name X 1

Both dish soap and baby powder are defined as general household products (the "Personal" category under **Properties** has been set at "No"), and therefore show a variable life span. Since Ms. Thomsen's household has 6 members, she'll be eligible for dish soap every 24 days (see **Duration/Frequency** table). On the other hand, baby powder, while considered a general household product, is

allowed only for households with infant members, and the lifespan calculation for a household is based on the number of infant members. Since Ms. Thomsen has only one infant, she will only be able to receive baby powder every 60 days.

Women's deodorant is considered a personal product, so there is no variation in the product duration; but since Ms. Thomsen is the only female age 12 or older, her household will not be able to request more than one women's deodorant on any visit until her daughter turns 12. Both now and at that time, she will only be able to request deodorant every 60 days (and when her daughter does turn 12, PEPbase will track and control both the quantity and the date of any deodorants she receives).

Shopping Lists: The interaction of the Household and Product databases

Who gets what? Drawing on the Household database

When Ms. Thomsen first visited, she of course had no shopping history, so all products that were available to her on the basis of the product property definition matrix – Personal/Household, Gender-Specific, Age-Specific, and Condition-Specific – were available to her. The information that PEPbase had on her household is, again:

If needed, you can override the values for household size and composition for this shopping trip. If you do, please ensure that you print out an update-registration form so the updated information can be gathered for later entry. Also, if there are any changes to the guest's address, phone number, etc, please print out a form so the records can be updated.
 If it's convenient, changes and corrections can be made directly on this screen, and will be reflected both on the update-registration form that's printed, and in the saved record for the guest.

MAIN INFO	Name	First: Kristin	Last: Thomsen	Pantry-ID#: 35
	Address	Num: 1234	Street: Main Street	Apt#: 102
		City: Somewhere	County: Dane	ST: WI
ContactInfo	Phone1: 123-555-1234	Phone2: 321-555-1234	Email: kthomsen@server.com	
ADDL INFO	Reg Date : 2009-03-24	Ms. Thomsen is expecting a new baby in October; please update status at next visit. (3/24/09, cjt)		
	ID Verified? Yes <input type="checkbox"/> No <input type="checkbox"/>	Diffic Reading? No <input type="checkbox"/>	Notes:	
SHOPPING INFO	<input checked="" type="radio"/> Use Household Values <input type="radio"/> Set Manual Override Values			
	...Males...		...Females...	
	Total	Incont	Total	Incont
	1	0	1	0
	0	0	0	0
	2	0	1	0
1	0	0	0	
Allergies In Household: No				
Last Visit 0000-00-00		Adults (18+)	1	0
		Teens (12-17)	0	0
		Youth (4-11)	2	0
		Infants (0-3)	1	0
Allergies In Household? No <input type="checkbox"/>				
<input type="button" value="Save Household"/> <input type="button" value="Print/Save"/> <input type="button" value="Reset Changes"/> <input type="button" value="Clear Form"/>				
Click the Save Household button to save the entered information and generate a shopping list. Click the Print/Save button print an update-registration form in addition to saving any changes, and generating a shopping list.				
Abandon all of this information, and return to the PEP Main Index				

The PEPbase software compared her household to the product definitions, and generated this shopping list for her initial visit:

PERSONAL ESSENTIALS PANTRY SHOPPING LIST			
KRISTIN THOMSEN		DATE: 2009-03-24 ID# 35	<i>Pantry Initials</i>
Please use the boxes and lines on the left, and <i>NOT THE GREY RECTANGLES</i> , to let us know which and how many items you need. (Please observe the limits - these are set to help us serve all people in need in a fair and reasonable manner.)			
<input type="checkbox"/> toilet paper (two rolls) <input type="checkbox"/> kleenex (one box) <input type="checkbox"/> laundry soap (one package) <input type="checkbox"/> dish soap (one bottle) <input type="checkbox"/> all-purpose cleaner (one bottle) <input type="checkbox"/> glass cleaner (one bottle) <input type="checkbox"/> paper towels (one roll) <input type="checkbox"/> garbage bags (pkg of ten bags) _____ hair pick (No more than 6) _____ comb (No more than 6) _____ brush (No more than 6) _____ lip balm (No more than 6) <input type="checkbox"/> dental floss (one package) _____ nail clipper (No more than 6) _____ emery board (No more than 6) _____ toothbrush (child's) (No more than 4) _____ toothbrush (adult) (No more than 2) _____ razor (woman's) (No more than 1) _____ deodorant (woman's) (No more than 1) <input type="checkbox"/> Q-tips (one bag, approx. 30) _____ razor (man's) (No more than 1) _____ deodorant (man's) (No more than 1) <input type="checkbox"/> band-aids (one bag of ten) <input type="checkbox"/> soap (one bar or equivalent)	<input type="checkbox"/> toothpaste (one tube) <input type="checkbox"/> shaving cream (one package) <input type="checkbox"/> body powder (adult) (one package) <input type="checkbox"/> skin lotion (one package) <input type="checkbox"/> first aid ointment (one package) <input type="checkbox"/> vaseline (one package) <input type="checkbox"/> tampons (No more than 1) _____ regular / normal // reguliere _____ super / super // grand <input type="checkbox"/> sanitary pads (No more than 1) _____ regular / normal // reguliere _____ super / super // grand <input type="checkbox"/> pantliners (No more than 1) <input type="checkbox"/> shampoo (one bottle) <input type="checkbox"/> conditioner (one bottle) <input type="checkbox"/> baby wipes (one package) <input type="checkbox"/> diaper rash ointment (one package) <input type="checkbox"/> baby powder (one package) <input type="checkbox"/> baby lotion (one package) <input type="checkbox"/> baby shampoo (one bottle) <input type="checkbox"/> diapers (No more than 1) _____ sz/tamaÃ±o/hom loj me/taille 1 _____ sz/tamaÃ±o/hom loj me/taille 2 _____ sz/tamaÃ±o/hom loj me/taille 3 _____ sz/tamaÃ±o/hom loj me/taille 4 _____ sz/tamaÃ±o/hom loj me/taille 5 _____ sz/tamaÃ±o/hom loj me/taille 6		

You'll notice that the PEPbase software has adjusted all of the personal products (those shown with lines, rather than rounded rectangles) to show how many Ms. Thomsen can request – 6 for those products that all family members are eligible for, 2 for the adults-only product, 1 for the infants-only product, and 4 for the infant and youth products. (The shaded rectangles are where the Picker/Filler to records what has been given; see the discussion under *Recording the shopping in the PEPbase in Routine Use* section of this manual.)

Who gets what when? Drawing on the Shopping History database

When Ms. Thompson's order was filled, the Picker/Filler recorded what products were actually available and given to Ms. Thomsen, and the Data Entry staff member in turn entered that into the PEPbase. When Ms. Thomsen returned on April 5, PEPbase compared her "theoretical" order (what she was eligible for based on household composition) to her shopping history, and generated the following list (and this is her full shopping list; the only thing you aren't seeing is the header information of her name, the date, and her ID#):

<input type="checkbox"/>	kleenex (one box)	<input type="checkbox"/>
<input type="checkbox"/>	hair pick (No more than 5)	<input type="checkbox"/>
<input type="checkbox"/>	comb (No more than 5)	<input type="checkbox"/>
<input type="checkbox"/>	brush (No more than 5)	<input type="checkbox"/>
<input type="checkbox"/>	lip balm (No more than 4)	<input type="checkbox"/>
<input type="checkbox"/>	nail clipper (No more than 6)	<input type="checkbox"/>
<input type="checkbox"/>	emery board (No more than 4)	<input type="checkbox"/>
<input type="checkbox"/>	toothbrush (child's) (No more than 1)	<input type="checkbox"/>
<input type="checkbox"/>	razor (woman's) (No more than 1)	<input type="checkbox"/>
<input type="checkbox"/>	razor (man's) (No more than 1)	<input type="checkbox"/>
<input type="checkbox"/>	band-aids (one bag of ten)	<input type="checkbox"/>
<input type="checkbox"/>	body powder (adult) (one package)	<input type="checkbox"/>
<input type="checkbox"/>	skin lotion (one package)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	tampons (No more than 1)	<input type="checkbox"/>
	____ regular / normal / / reguliere	
	____ super / super / / grand	
<input checked="" type="checkbox"/>	sanitary pads (No more than 1)	<input type="checkbox"/>
	____ regular / normal / / reguliere	
	____ super / super / / grand	
<input type="checkbox"/>	pantiliners (No more than 1)	<input type="checkbox"/>
<input type="checkbox"/>	conditioner (one bottle)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	pull-ups (No more than 1)	<input type="checkbox"/>
	____ sz/tamaÃ±o/hom loj me/tai 2T-3	
	____ sz/tamaÃ±o/hom loj me/tai 3T-4	
	____ sz/tamaÃ±o/hom loj me/tai 4T-5	
	____ sz/tamaÃ±o/hom loj me/tai 5T-6	

Any general household products that Ms. Thomsen last received within their defined product duration have been removed from her list; and any personal products, where she was eligible to request multiple of those items (children's toothbrushes, for instance) have been reduced by the number of that product that she received within the defined product duration.

Concluding remarks

The product definitions for the products that your agency will undoubtedly differ from ours – you may be using very generic, one-size-fits-all definitions, or very specific but very different definitions. Your agency may not be using the shopping list generation capability at all, but using PEPbase mostly as a way of tracking households. However, we thought it useful to show you how the Household database and Product database meshed, and how those two meshed with the Shopping History database (because this is one of the “housekeeping” or “maintenance databases,” it isn’t discussed in depth here; see the *PEPbase in Routine Use* and *Coordinator Functions* sections for more detailed discussions).

Even a very generic set of products (“Carbohydrates,” “Meats,” “Fruits,” “Vegetables,” for instance) and product definitions (everything’s “general household,” with a product duration of 30 days regardless of household size) would let your agency regulate household visits, since no household would be eligible for anything more frequently than 30 days. To the extent that it makes sense for your agency to delineate more specific products and more specific product definitions, your agency will have greater flexibility while still maintaining inventory control, and will have more specific information tracked and reportable about your agency’s support of your guests.