



Provider Ordering Manual

Updated October 28, 2022

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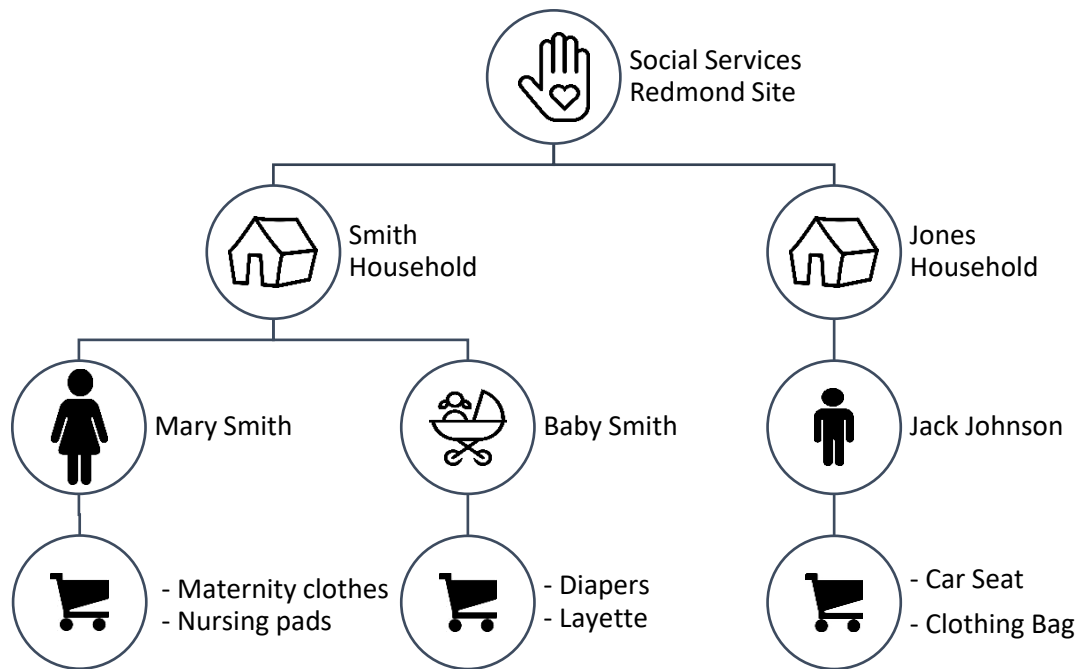
Overview

The KidVantage ordering system is powered by Salesforce, an online database service. This service enables the tracking and reporting that KidVantage needs to improve its operations, educate its supporters, and apply for specific grants. KidVantage’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 KidVantage.
	Household	The physical location of the recipient or their primary caregiver. HOUSEHOLD = LAST NAME or OTHER FAMILY IDENTIFIER
	Contact	The recipient, also referred to as a Household Member. CONTACT = RECIPIENT
	Order	All items ordered for a given recipient for a given pick-up date and location.



To place an order with KidVantage, 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 KidVantage 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 KidVantage's website for links to additional resources:

<https://kidvantagew.org/provider-partners/>

- 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 KidVantage at ruchic@KidVantagew.org or call 425-372-7528.

To access the online portal:

1. Go to the Provider page of the KidVantage website and click on **Provider Login**.

<https://kidvantagew.org/provider-partners/>

Partners Built on Collaboration!

Since its founding, EBC-Eastside Baby Corner has partnered with organizations serving children birth through age 12 and expectant moms to ensure that all children have what they need to thrive. Partner organizations can order from a catalog of over 200 essential products, offered without charge to partners or families. EBC works with nonprofits and government agencies serving families in King (outside of Seattle), Snohomish, Pierce, Kitsap and Mason counties.

EBC considers applications for new partnerships on a quarterly basis.

1. Complete an application. This will help us understand if your agency and program are a good fit for EBC's services and model.

Some basic qualifications include:

- Your agency must be a nonprofit or governmental agency. For-profit organizations will be considered only if the program they are requesting partnership for is nonprofit.
- You must serve children and/or families within our existing service area
- You must be able to order (on our online ordering system), pick up and distribute goods to families on a regular basis.

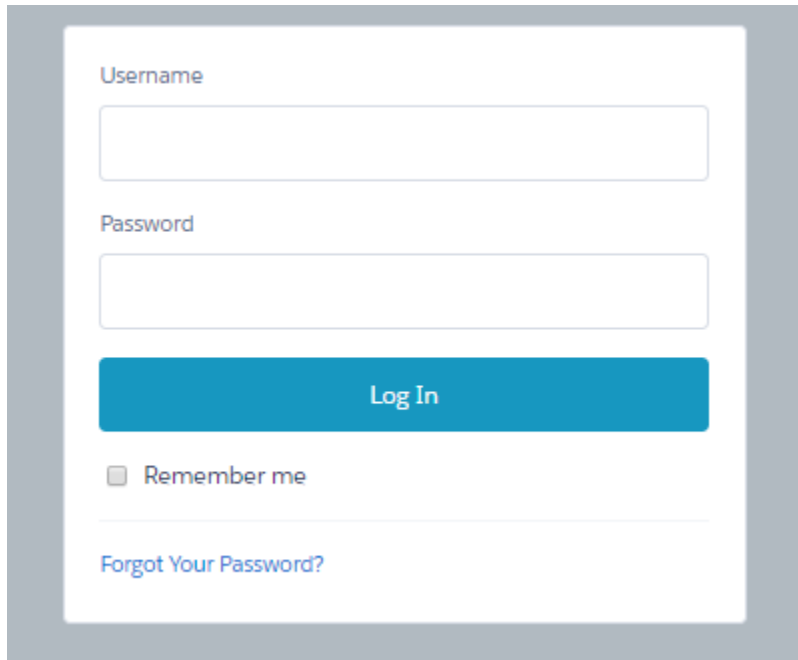
For further information, please contact our Partner Services Coordinator Ruchi Charekar at ruchic@babycorner.org or (425)372-7528.

[EBC Partner Agency Application](#)

[Provider Partners](#)

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Website by Bullseye Creative

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



The image shows a login form with the following elements:

- A text input field labeled "Username".
- A text input field labeled "Password".
- A blue button labeled "Log In".
- A checkbox labeled "Remember me".
- A link labeled "Forgot Your Password?" below a horizontal line.

To retrieve a password:

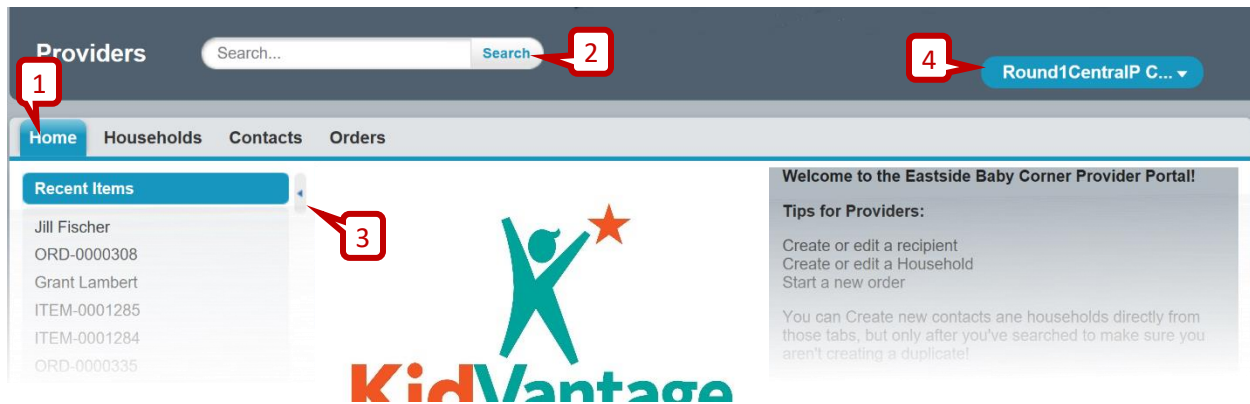
Click **Forgot Your Password?** An automated message will be sent through Salesforce to the email address associated with your account.

To retrieve a username:

Contact KidVantage at ruchic@KidVantagenw.org or call 425-372-7528.

Basic Features

The Provider Portal provides customized access to the KidVantage 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 KidVantage 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 ruchic@KidVantagenw.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 last name 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**.

The screenshot shows the 'Providers' interface with the 'Households' tab selected. The 'Create New Household' button is circled in red. Below the button is a table of recent households.

Household Name	Number of Household Members
Briggum	1
Major	2
Jones	1
Barry	2

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

The screenshot shows the 'Household Edit' form for a 'New Household'. The form includes several fields for household information, with a legend indicating that red vertical bars next to field labels denote required information.

Household Edit [Save] [Save & New] [Cancel]

Household Information | = Required Information

Household Name

Zip Code Lookup

Income Level

Homeless

Household Status

Number of Household Members 0

- 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 Information	
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 .
Housing Status	Select the living situation for the family.
Primary Language Spoken in HH	Select the primary language that is spoken within the household.
Benefits Received	Select all benefits the family is receiving. You can either double click on the benefit in the "available" column to move it to the "chosen" column, or use the arrows to select. Click OK when complete.
Primary Caregiver	
Total # of People in Household	Total number of people living in household, <u>not just</u> those receiving KidVantage services.
Primary Caregiver	The primary caregiver(s) that the recipients live with.
Primary Caregiver identifies as LGBTQ+?	If yes , check the box.
Primary Caregiver has a disability	If yes , check the box.
Employment Status	Choose the employment status of the primary caregiver(s).
Household Status	Active default.

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

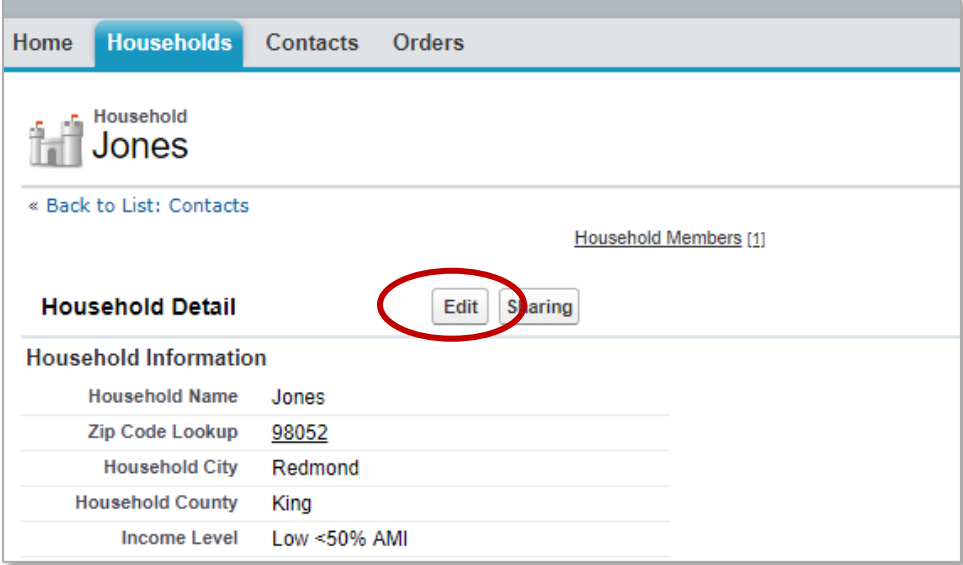


If you have several households to add, click **Save & New** to save the current record and open a new one.

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**.



The screenshot shows a web interface with a navigation bar at the top containing 'Home', 'Households', 'Contacts', and 'Orders'. The 'Households' tab is active. Below the navigation bar, there is a header for 'Household Jones' with a house icon. A link '<< Back to List: Contacts' is on the left, and 'Household Members [1]' is on the right. Under the 'Household Detail' section, there are two buttons: 'Edit' and 'Sharing'. The 'Edit' button is circled in red. Below this is a table for 'Household Information' with the following data:

Household Information	
Household Name	Jones
Zip Code Lookup	98052
Household City	Redmond
Household County	King
Income Level	Low <50% AMI

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@KidVantagenw.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**.

Last Updated by Provider 4/2/2018

Edit Sharing

Household Members **New Recipient**

Action	Name	New Order	Age	Status	Last Updated by Pr
Edit	Jack Johnson		3 Years, 3 Months	Active	4/2/2018

[^ Back To Top](#) Always show me [more records per related list](#)

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 KidVantage'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 <u>C</u> hild, 1-7 <u>Y</u> outh, or 8-12 <u>A</u> dult. 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		
English Proficiency	Choose the level of language proficiency of the recipient. For young children, this is determined by the care giver's English proficiency.	Choose the language proficiency of the home
Military Service		
Recipient has a 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 KidVantage 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 KidVantage.

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 KidVantage database:

In the event a possible duplicate was created outside your own organization, but within the KidVantage 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 KidVantage.

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**.

The screenshot shows the 'Providers' interface. At the top, there is a search bar and a 'Regina Provider' dropdown. Below this is a navigation bar with 'Home', 'Households', 'Contacts', and 'Orders'. The main content area shows contact information for 'JACK JOHNSON'. The fields for Height (36), Weight (32), Clothing Size (3T), Shoe Size (9 C), and Shoe Width (Medium) are highlighted with a red box. An 'Update' button is located to the right of these fields. Below the contact information is the 'ORDER DETAILS' section, which includes fields for Order Number, Provider (Regina Louise Provider Jr.), Pickup Date (2018-04-26), and Branch (Central). There are buttons for 'Emergency Order' and 'Save Order'. At the bottom, there is a table with columns for PRODUCT, PRODUCT COMMENT, ORDER LINE COMMENT, QUANTITY, and VALIDATION MESSAGE. The table contains one row for '++JEN TEST PRODUCT' with a quantity of 1.

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@KidVantagenw.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 KidVantage 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**.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Households', 'Contacts', and 'Orders'. The 'Contacts' tab is selected. Below the navigation bar, there is a header for 'Contact Mickey Mouse' with a 'Show Feed' button and a link to '< Back to List: Households'. A link for 'Orders Received [1]' is also visible. The main content area is titled 'Contact Detail' and contains a table with the following information:

Name	Mickey Mouse	Status	Active
Household	Disney	Last Updated by Provider	10/20/2017

Below the table, there are two buttons: 'Edit' and 'Create Order'. The 'Create Order' button is circled in red.



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.

PRODUCT	PRODUCT COMMENT	ORDER LINE COMMENT	QUANTITY	VALIDATION MESSAGE
++JEN TEST PRODUCT	Beware of this product	Comment	1	

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 cannot change the pick-up date. If the pick-up date needs to be changed, please email corib@KidVantagenw.org.

Providers Search... Search Regina Provider ▾

Home Households **Contacts** Orders

JACK JOHNSON

Age 3 Years, 3 Months Height Weight Clothing Size Shoe Size Shoe Width

[Go to Household](#)

ORDER DETAILS

Order Number Provider **Regina Louise Provider Jr.** **Pickup Date** Branch **Central**

View Ordered Items Only View All Products

ALL BEDS + DÉCOR CLOTHING DIAPERS + POTTY EQUIPMENT FEEDING HOUSE + FOODBANK PERSONAL CARE SAFETY TOYS CAR SEAT

PRODUCT	PRODUCT COMMENT	ORDER LINE COMMENT	QUANTITY	VALIDATION MESSAGE
<input type="checkbox"/> ++JEN TEST PRODUCT	Beware of this product	Comment <input type="text"/>	Quantity of Items <input type="text" value="1"/>	

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

Providers Search... Search Regina Provider ▾

Home Households **Contacts** Orders

JACK JOHNSON

Age 3 Years, 3 Months Height Weight Clothing Size Shoe Size Shoe Width

[Go to Household](#)

ORDER DETAILS

Order Number Provider **Regina Louise Provider Jr.** Pickup Date Branch **Central**

View Ordered Items Only View All Products

ALL BEDS + DÉCOR **CLOTHING** DIAPERS + POTTY EQUIPMENT FEEDING HOUSE + FOODBANK PERSONAL CARE SAFETY TOYS CAR SEAT

PRODUCT	PRODUCT COMMENT	ORDER LINE COMMENT	QUANTITY	VALIDATION MESSAGE
<input type="checkbox"/> ++JEN TEST PRODUCT	Beware of this product	Comment <input type="text"/>	Quantity of Items <input type="text" value="1"/>	



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". These items will not be ordered until you save the order.

The screenshot shows the 'Providers' web application interface. At the top, there is a search bar and a user profile for 'Buddy the Elf Pr...'. Below the navigation menu (Home, Households, **Contacts**, Orders), the user profile for JACK JOHNSON is displayed with fields for Age (3 Years, 2 Months), Height (36), Weight (30), Clothing Size (3T), Shoe Size (8 C), and Shoe Width (Medium). An 'Update' button is next to these fields. Below the profile is a 'Go to Household' link. The 'ORDER DETAILS' section is highlighted with a red circle and contains the following information: Order Number, Provider (Buddy the Elf Provider TEST), Pickup Date (2018-04-05), and Branch (Central). There are radio buttons for 'View Ordered Items Only' and 'View All Products', and a blue 'Emergency Order' button. At the bottom of the order details is a 'Save Order' button. The bottom of the page features a category navigation bar with tabs: ALL, BEDS + DÉCOR, CLOTHING, DIAPERS + POTTY, EQUIPMENT, FEEDING, HOUSE + FOODBANK, PERSONAL CARE, SAFETY, TOYS, and CAR SEAT. Below this is a table header with columns: PRODUCT, PRODUCT COMMENT, ORDER LINE COMMENT, QUANTITY, and VALIDATION MESSAGE.

8. Click **Save Order**.

You may save the order multiple times to continue adding items as you wish.

The screenshot shows the 'Providers' interface. At the top, there is a search bar and a dropdown menu for 'Buddy the Elf Pr...'. Below this is a navigation bar with 'Home', 'Households', 'Contacts', and 'Orders'. The main content area displays 'JACK JOHNSON' with fields for Age (3 Years, 2 Months), Height (36), Weight (30), Clothing Size (3T), Shoe Size (8 C), and Shoe Width (Medium). An 'Update' button is next to these fields. Below the fields is a 'Go to Household' button. The 'ORDER DETAILS' section shows 'Order Number', 'Provider: Buddy the Elf Provider TEST', 'Pickup Date: 2018-04-05', and 'Branch: Central'. There are radio buttons for 'View Ordered Items Only' and 'View All Products', and an 'Emergency Order' button. A blue 'Save Order' button is circled in red. At the bottom, there is a navigation bar with categories: ALL, BEDS + DÉCOR, CLOTHING, DIAPERS + POTTY, EQUIPMENT, FEEDING, HOUSE + FOODBANK, PERSONAL CARE, SAFETY, TOYS, CAR SEAT. Below this is a table header with columns: PRODUCT, PRODUCT COMMENT, ORDER LINE COMMENT, QUANTITY, and VALIDATION MESSAGE.

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.

The screenshot shows the 'Providers' interface after the order is placed. A dark blue confirmation message is displayed above the 'ORDER DETAILS' section, stating 'Your order was created. You can keep editing, or you can use the links above to go back and start a new order.' A 'Close' button is next to the message. The 'ORDER DETAILS' section now shows 'Order Number: ORD-0001515', 'Provider: Buddy the Elf Provider TEST', 'Pickup Date: 2018-04-05', and 'Branch: Central'. There are radio buttons for 'View Ordered Items Only' and 'View All Products', and an 'Emergency Order' button. A blue 'Save Order' button is visible below the 'ORDER DETAILS' section.

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.



Please scroll below to correct the validation errors and save the order Close

ORDER DETAILS

Order Number ORD-0001515

Provider Buddy the Elf Provider TEST

Pickup Date 2018-04-05

Branch Central

View Ordered Items Only View All Products

Emergency Order

Save Order

ALL BEDS + DÉCOR CLOTHING DIAPERS + POTTY EQUIPMENT FEEDING HOUSE + FOODBANK PERSONAL CARE SAF

<input type="checkbox"/> PRODUCT	PRODUCT COMMENT	ORDER LINE COMMENT	QUANTITY	VALIDATION MESSAGE
<input checked="" type="checkbox"/> Baby Carrier - Front Pack	Child must be under 12 mo and under 25 lbs.	Comment <input type="text"/>		The recipient is outside the required age range for the ordered product, or
<input checked="" type="checkbox"/> Diaper Bag		Comment <input type="text" value="Test comment"/>		

Emergency Orders

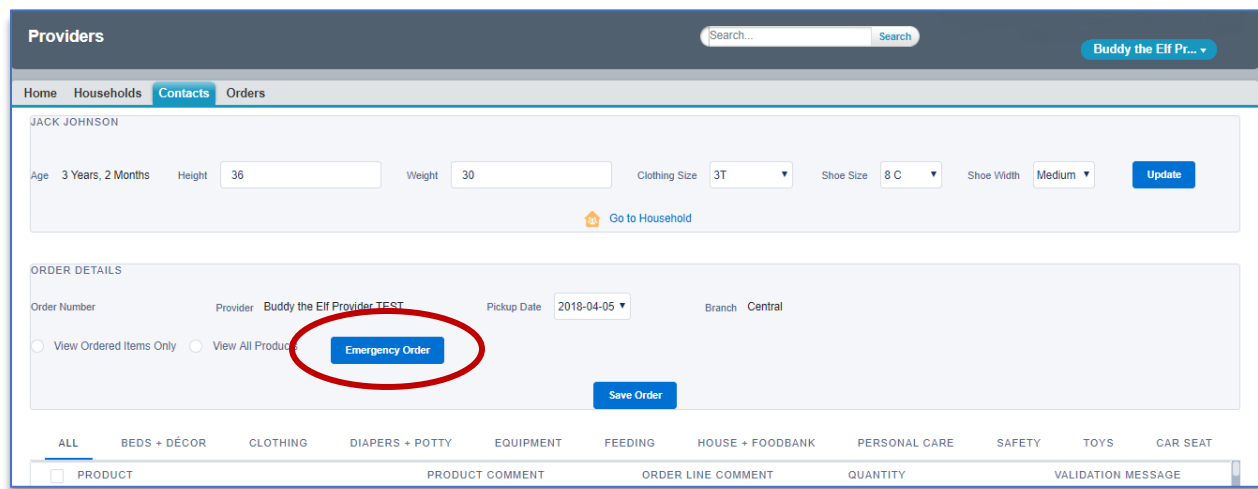
Emergency orders are available for families in crisis. If the deadline for placing orders has past, but you have an emergency, you can call KidVantage and get an emergency code that will allow you to place the order for the upcoming pickup date. All orders must be placed into the system by 10:00am on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

Please note that the following items are the only items available for emergency orders:

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

To place an emergency order:

1. Email corib@kidvantagew.org or call at 425-372-7529 to receive an emergency code.
2. On the ordering screen, click the **Emergency Order** button.



The screenshot shows the 'Providers' section of the KidVantage website. At the top, there is a search bar and a user profile for 'Buddy the Elf Pr...'. Below this, there are navigation tabs for 'Home', 'Households', 'Contacts', and 'Orders'. The main content area displays the profile of 'JACK JOHNSON' with fields for Age (3 Years, 2 Months), Height (36), Weight (30), Clothing Size (3T), Shoe Size (8 C), and Shoe Width (Medium). An 'Update' button is next to these fields. Below the profile is a 'Go to Household' button. The 'ORDER DETAILS' section shows the Order Number, Provider (Buddy the Elf Provider TEST), Pickup Date (2018-04-05), and Branch (Central). There are two radio buttons: 'View Ordered Items Only' and 'View All Products'. The 'Emergency Order' button is highlighted with a red circle. Below the order details is a 'Save Order' button. At the bottom, there is a category navigation bar with 'ALL' selected, and a table header with columns: PRODUCT, PRODUCT COMMENT, ORDER LINE COMMENT, QUANTITY, and VALIDATION MESSAGE.

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

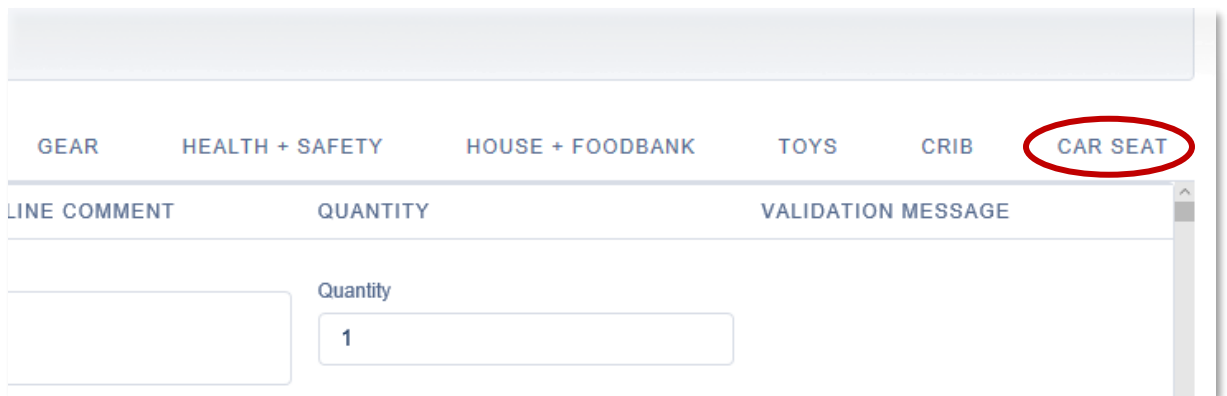
4. Proceed with the order.

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.

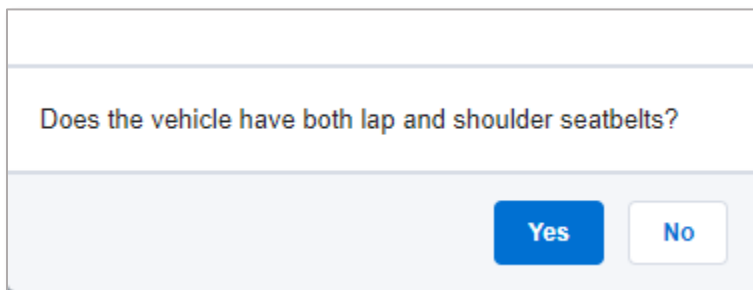
To order a car seat:

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.



The screenshot shows a navigation bar with tabs: GEAR, HEALTH + SAFETY, HOUSE + FOODBANK, TOYS, CRIB, and CAR SEAT. The 'CAR SEAT' tab is circled in red. Below the navigation bar is a table with columns: LINE COMMENT, QUANTITY, and VALIDATION MESSAGE. The 'QUANTITY' column has a text input field containing the number '1'.

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

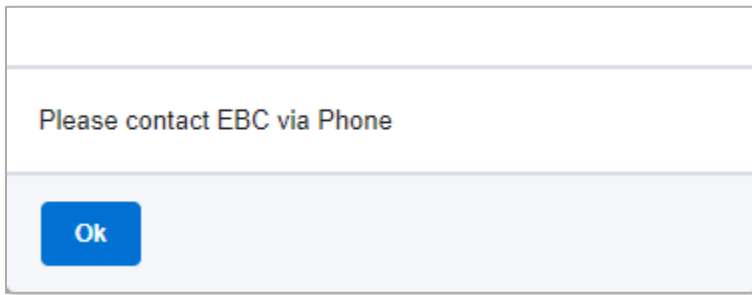


The pop-up window contains the text: "Does the vehicle have both lap and shoulder seatbelts?". At the bottom right, there are two buttons: "Yes" (highlighted in blue) and "No" (white with a blue border).

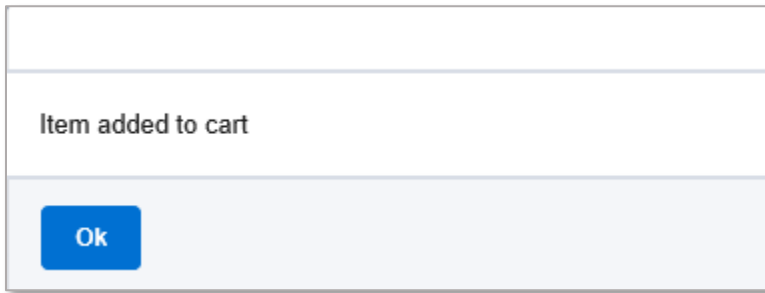


Car seat orders may take a minute to process, please wait and do not click **Yes** more than once, or multiple car seats may be ordered.

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 contact KidVantage at corib@kidvantage.org or 425-372-7529 to talk to one of KidVantage's Child Passenger Safety Technicians. Click **OK** to exit.



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**.



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", email corib@kidvantagew.org or by calling 425-372-7529.

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 KidVantage 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 email KidVantage at corib@kidvantagew.org or by calling 425-372-7529.

Frequently Asked Questions

For technical questions about the online ordering system, contact webmaster@KidVantagenw.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 KidVantage 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?

KidVantage uses recipient and household demographic information to apply for grants that target specific groups and to generate community support and funding. It also helps KidVantage to better understand and serve the families we are helping.

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	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		Men's	
	inches	cm	inches	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
