



Followup Presentation

For TOUCH New York

Visual Mockups for Digital Recordkeeping System





Visual Mockups: Typeface and Color Palettes

The UI design will match the design of the TOUCH website by using the same colors and fonts.

The three colors at the top are all picked from the TOUCH logo. The blue and red at the top should *never* be used to distinguish between two important items because their brightness is the same. The bottom two colors are picked from the TOUCH website.

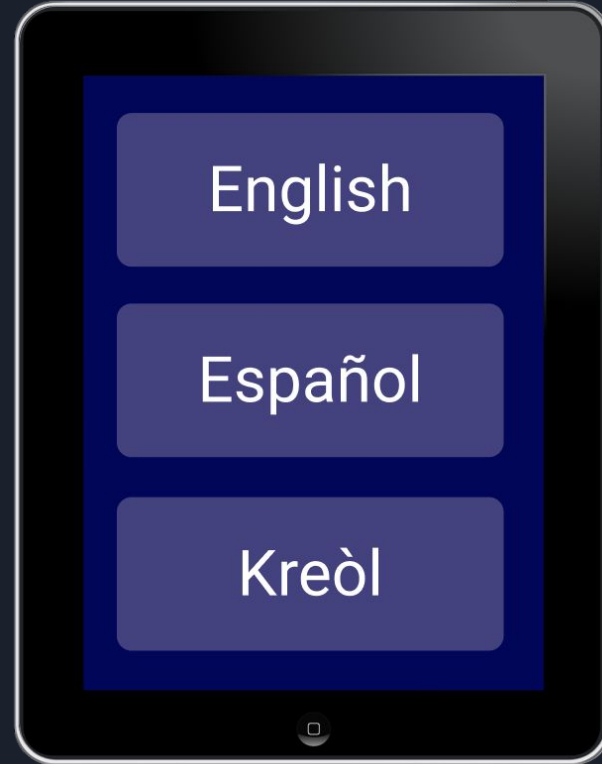


Roboto is the font currently being used everywhere on the TOUCH website. It is a clean and simple font designed by Google that is in use on hundreds of popular services and apps.

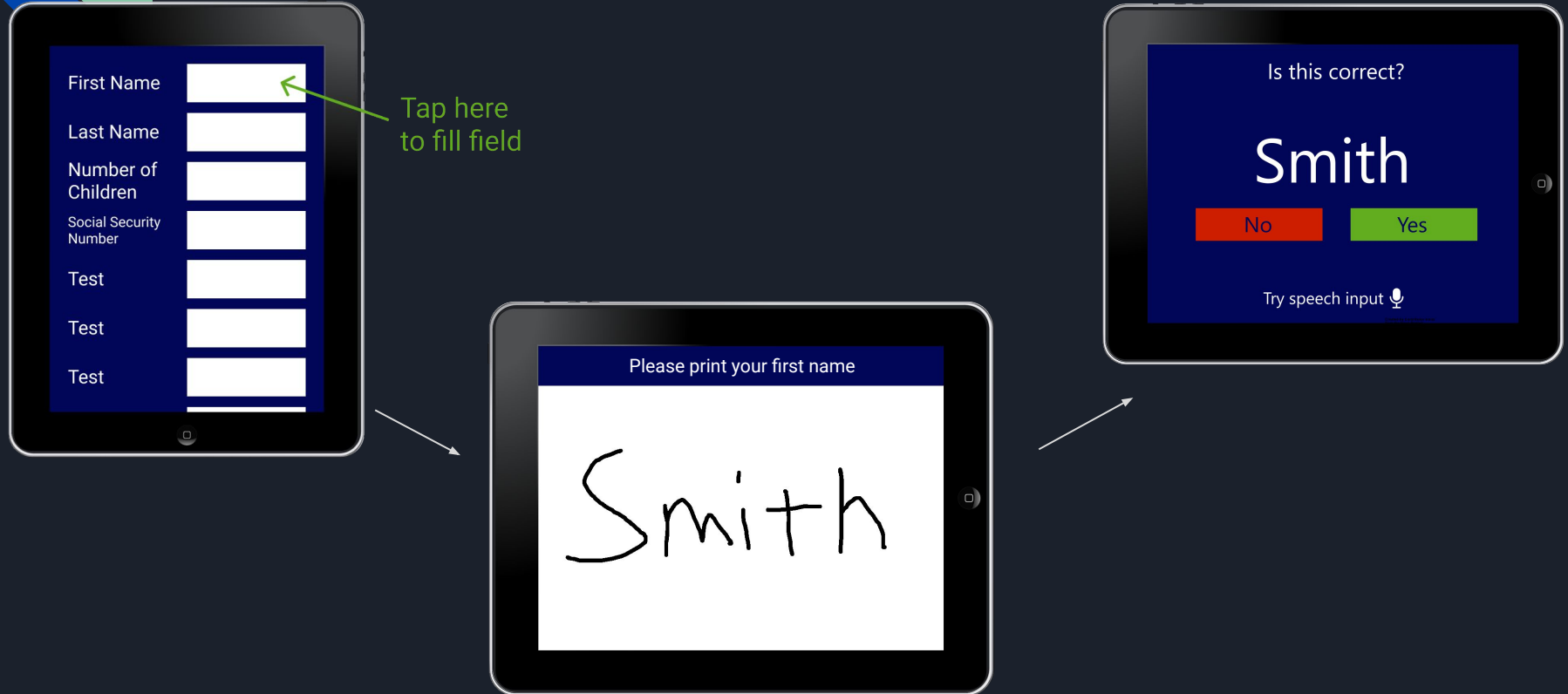
Roboto

Visual Mockups: Form Language Select

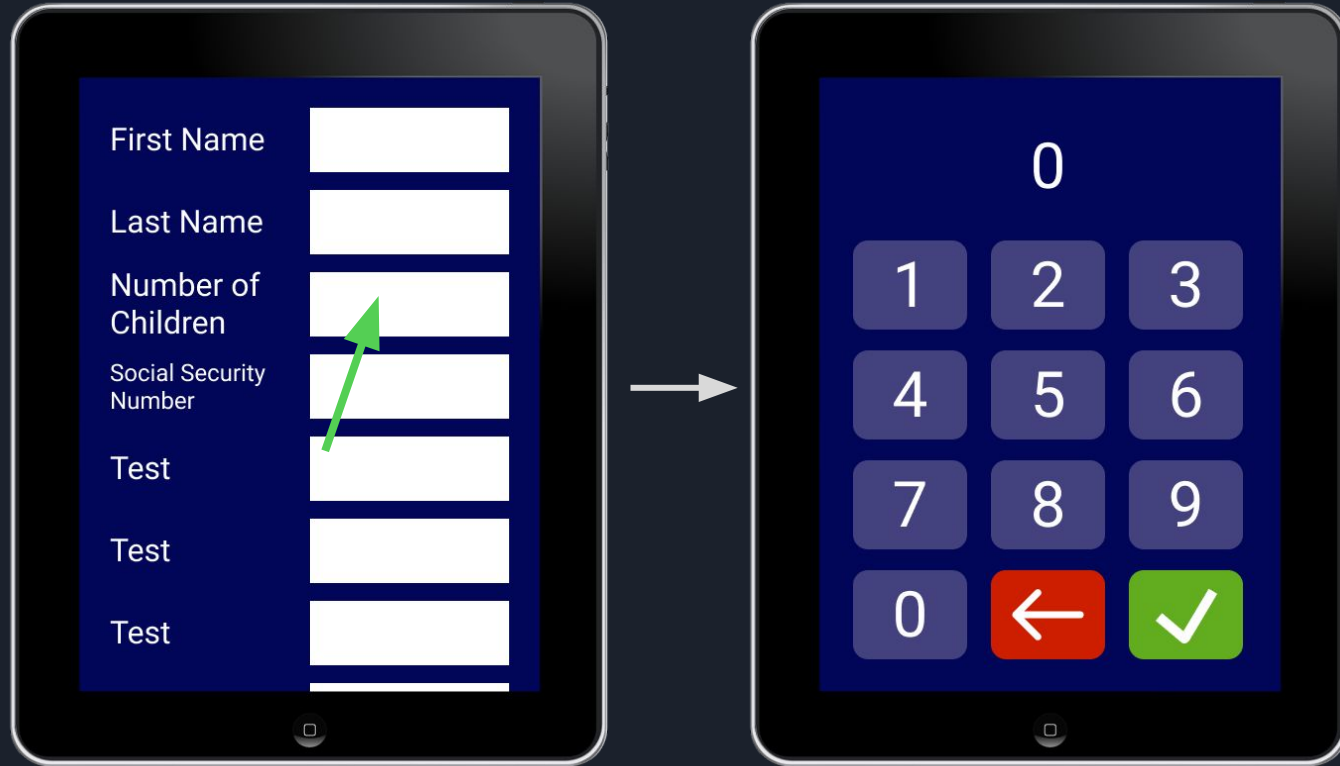
The Client form can start with a screen that allows the user to pick their language.



Visual Mockups: Form Interface



Visual Mockups: Form Number Entry





I Interviewed Tiffany Lloyd from TOUCH

On March 15th, I had a phone call with Tiffany Lloyd from TOUCH.

It seems that TOUCH already has many digital forms of data entry and record-keeping in place. Lloyd stated that when she joined TOUCH, she replaced an old paper form with a Google Forms version, which may be this [Google Forms page for volunteer applications](#) on TOUCH's website

She stated that any remaining paper forms might not be a good fit for converting to digital. Some forms, like TEFAP forms, may be required by the government to be paper. Many of the volunteers are young disabled adults who might struggle to fill out a digital form (the handwriting and speech-to-text ideas *may* alleviate this).

I believe she mentioned Palmer's "volunteer portal" idea and stated that it may not be a good fit for the volunteers for the same reason (though she stated that the host of a volunteer group may be able to make use of the portal).



I Interviewed Tiffany Lloyd from TOUCH [2]

In conclusion, what I learned from my call with Lloyd is it seems that TOUCH already has relatively robust digital data entry and record keeping systems in place.

However, Lloyd told me that other smaller agencies in the Rockland Community Against Hunger network (which TOUCH is the leader of) may need a digital data entry and record-keeping overhaul more than TOUCH. For example, I could help by receiving the paper forms that these agencies use, and creating Google Forms/Microsoft Forms pages.



Are TEFAP Forms Required to be Physical?

This question is a bit difficult to research, but it seems the answer is **no, TEFAP forms can be digital.**

the [website for the Food and Nutrition Service of the U.S. Department of Agriculture](#) states that "The use of electronic record keeping... ..in TEFAP is permitted, **provided that the same degree of confidence regarding the accuracy of eligibility determinations results from the electronic system as from the traditional, paper-based system.**"

I believe it is the latter part of the quote that organizations struggle with. The website then links to [federal regulations that must be complied to](#); however, these regulations do not give clear guidance on how to build an information system that meets the regulations.

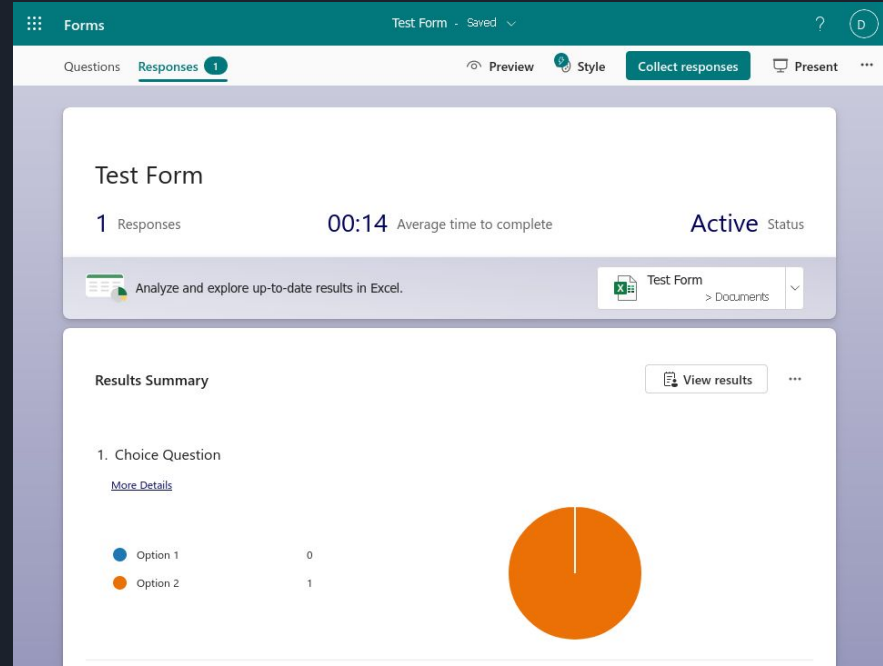
IT and Information Security are far outside the field of food distribution orgs., which may lead to an avoidance of digital forms out of fear of breaking the law and going over budget.

Alternative Idea: Microsoft Forms

The previous visual mockups were designed with the idea that they would be a new app.

However, using MS Forms could be a good option. The main advantage of MS Forms is that responses to surveys automatically sync up with a MS Excel (web) spreadsheet for data visualization. That Excel spreadsheet could then be imported into a MS Access database for permanent storage of records.

The main disadvantage is that using all of these MS apps requires Windows and a subscription to Microsoft 365. Although, both of these are so ubiquitous that many organizations may already have them.



The screenshot displays the Microsoft Forms web interface. At the top, a teal header bar contains the 'Forms' logo, the title 'Test Form', and a 'Saved' status. Below the header, a navigation bar includes tabs for 'Questions' and 'Responses' (the latter is active and marked with a '1'). To the right of the tabs are buttons for 'Preview', 'Style', 'Collect responses', and 'Present'. The main content area is titled 'Test Form' and shows '1 Responses', '00:14 Average time to complete', and an 'Active' status. Below this, there is a section for 'Analyze and explore up-to-date results in Excel' with a download icon and a 'Test Form' document link. The 'Results Summary' section features a 'View results' button and a list of questions. The first question is a 'Choice Question' with two options: 'Option 1' (0 responses) and 'Option 2' (1 response). A pie chart to the right of the options shows a single orange slice representing the one response for Option 2.


Option	Count
Option 1	0
Option 2	1

Microsoft Forms [2]

A form can be distributed through link, email, QR code, or embedded in a webpage.

When the form is viewed on a phone, the user can use the phone's handwriting and voice typing features to input text.

The screenshot shows a mobile interface for a Microsoft Forms survey. At the top, the status bar displays the time 9:24, signal strength, and 80% battery. The browser address bar shows the URL forms.office.com/pag. The survey content includes a radio button selection for 'Option 2', a 'Text Question' with a text input field containing 'Enter your answer', and a '"Likert" Question' with three options: 'Option 1', 'Option 2', and 'Option 3'. Below the survey questions is a 'Handwrite here!' section. At the bottom, there is a toolbar with icons for keyboard input, voice typing, and a bottom navigation bar with a keyboard icon, a smiley face icon, a globe icon, a language dropdown set to 'English', a close icon, and a next question arrow icon.

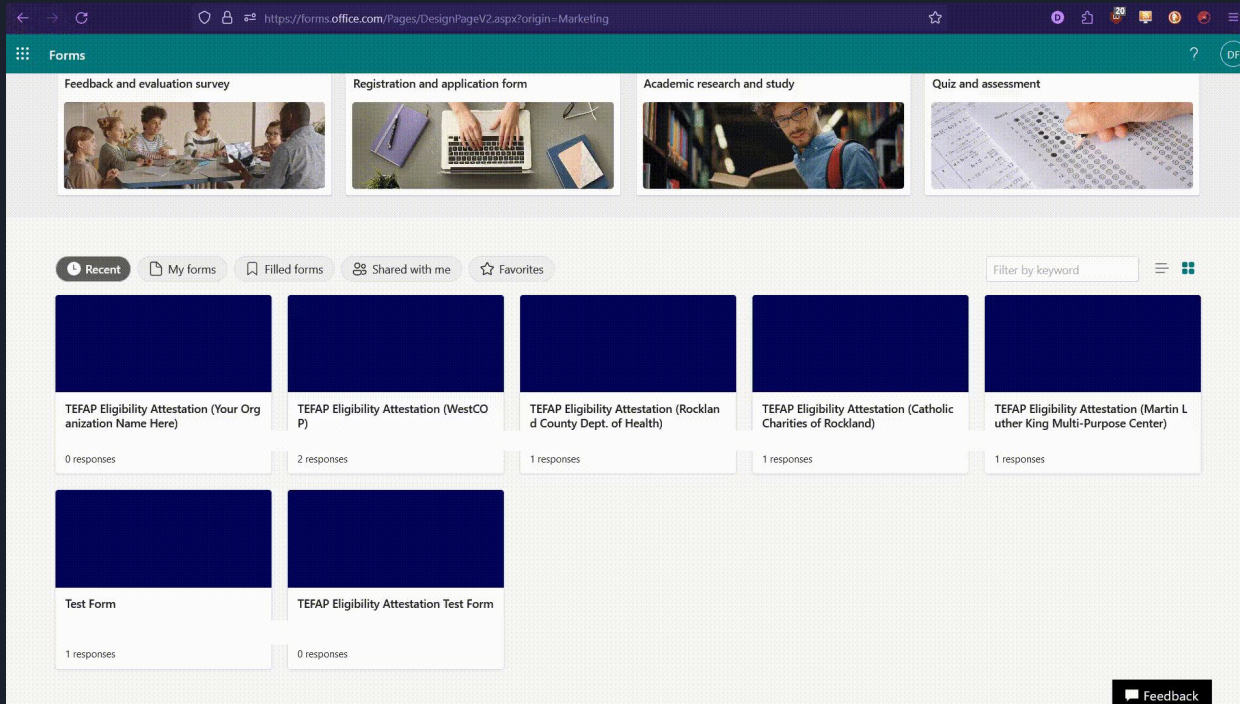


MS Forms Example: TEFAP Attestation of Eligibility

To test for myself if MS Forms would be adequate for converting physical forms to digital, I decided to take a pdf of a TEFAP Attestation of Eligibility form and recreate it in MS Forms.



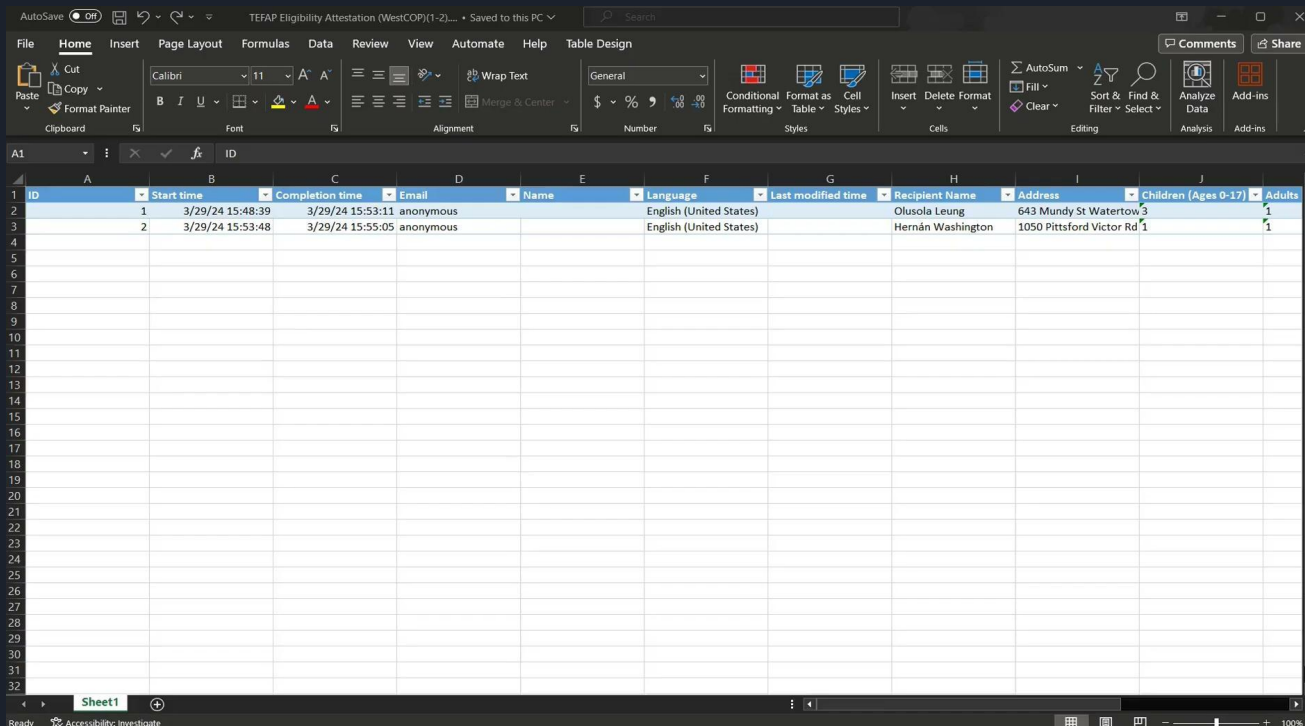
How to Consolidate Form Responses into an Access Database



First: Download all of the form response Excel files.

1. Sign in to the MS Forms website
2. Click on a form
3. Click the "Responses" tab
4. Click the downward arrow next to the Excel button
5. Click "Download a Copy" (you must have a local file to import data into Access)

How to Consolidate Form Responses into an Access Database (2)

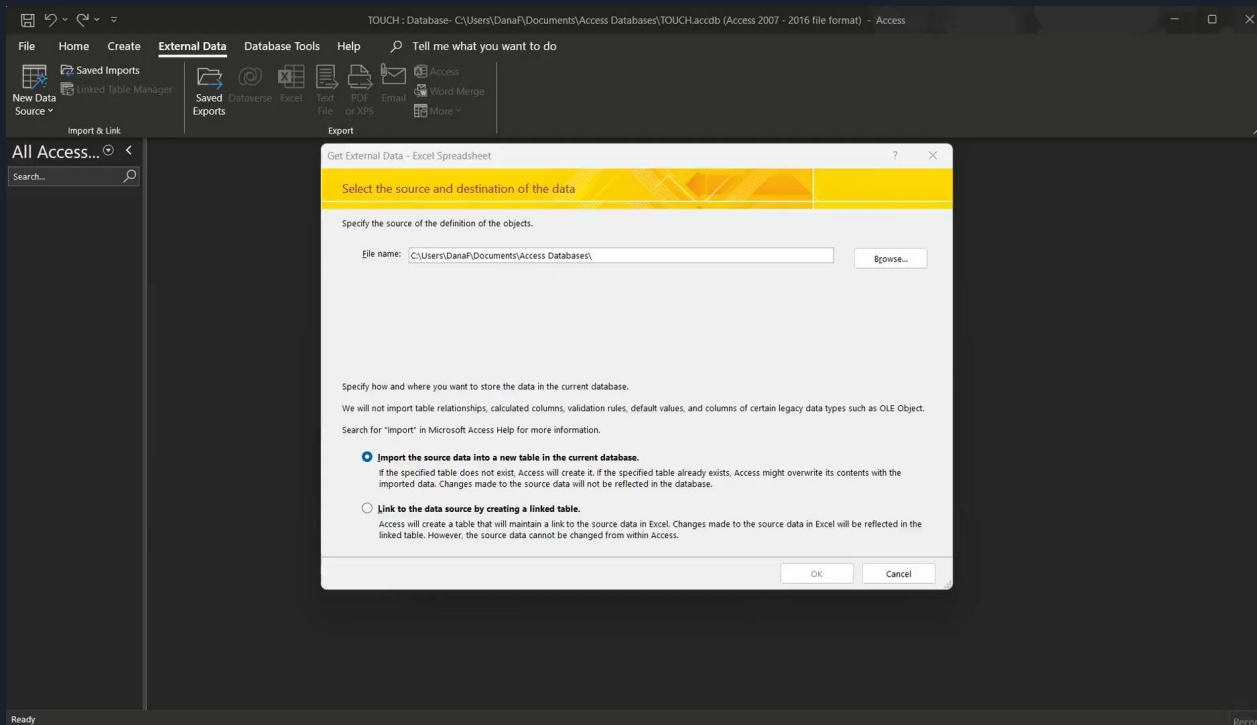
The image shows the Microsoft Excel interface. The ribbon is set to the 'Table Design' tab, with various options for table structure and formatting. The taskbar at the bottom shows the 'Sheet1' tab is active. The spreadsheet data is as follows:

ID	Start time	Completion time	Email	Name	Language	Last modified time	Recipient Name	Address	Children (Ages 0-17)	Adults
1	3/29/24 15:48:39	3/29/24 15:53:11	anonymous		English (United States)		Olusola Leung	643 Mundy St Watertown	3	1
2	3/29/24 15:53:48	3/29/24 15:55:05	anonymous		English (United States)		Hernán Washington	1050 Pittsford Victor Rd	1	1

Clean up the Excel spreadsheets.

1. Remove all line breaks by typing Ctrl + J in the Find box. **This will break Find until you restart Excel**
2. Delete unnecessary columns
3. Shorten long text
4. Convert numbers as text to numbers by clicking the yellow warning icon


How to Consolidate Form Responses into an Access Database (3)



Import the Excel spreadsheets into Access

1. With a database open, click “New Data Source > From File > Excel”
2. Click “Browse” and open your cleaned Excel file
3. Leave all options at their defaults. Name your table

To append another spreadsheet later: Repeat steps 1 & 2, but click “Append...to the table”. **As long as the spreadsheet you’re appending was cleaned in the same way, it should append successfully.**



Existing Digital Record-Keeping Services for Food Distribution Orgs.

In order to compete with pencil and paper, digital record-keeping systems *must* be free.

I mentioned [bosWell](#) in a previous presentation. They're free for food pantries to use. Their biggest flaw is that only social services orgs can learn how bosWell works. Their website is sparse, and the only ways to learn more are to schedule a demo, or to watch a video that inexplicably requires one to fill out a form with one's name and organization to view it.

I have learned more about Feeding Westchester's digital record-keeping services. It is called "[Service Insights](#) on MealConnect*" ([2](#)). Though the system was built by [Feeding America](#), it is not mentioned on their website aside from [training courses exclusive to FA's partners](#). Many of FA's partners have their own pages explaining the service and its benefits ([1](#), [2](#), [3](#)).

*[MealConnect](#) is FA's app to connect FD orgs, volunteers and donors. It seems to share some goals in common with Jack Smith's app, though the website only mentions food donation.

Thank you!

