Orientation to Service Insights

Digital Client Intake at Your Pantry

- Tell us a bit about yourself and your organization

- Why are you interested in Service Insights?

Orientation Agenda:

1. Service Insights – the Whats and Whys

2. How it Works

3. Demonstration

4. What's Next?

What is Service Insights?

Service Insights is an initiative for food banks across the country to equip themselves with information tools to learn more about the communities we serve.

We can't meet the needs of our community if we don't understand them.

unduplicated data to drive decision-making

Benefits to You, Our CAFB Partners

- Minimize paperwork (especially TEFAP partners)

- Track food and non-food services in one system

- Use reports to easily provide info for grants

- Order more appropriate food for your pantry

- Analyze and change your outreach

- Ongoing system support from CAFB

How will CAFB use the data collected?

- Procure food for all our cultures, age groups, and health conditions

- Better serve areas without enough food resources

- Provide grants to partners serving focus populations

- Advocate for clients in local & federal government

- And more – all in the service of our community

What is Service Insights?

Service Insights (sometimes called Neighbor Intake) is a web-based client management system built by Feeding America, specifically for food banks and pantries.

- Intuitive, step-by-step intake process
- Quick and easy to record pantry visits
- Up-to-the-minute reports
- SDI forms and TEFAP compliance are built into Service Insights

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Link2Feed is our legacy system. Every partner starting in 2022 will use Service Insights instead.

Service Insights the most upgraded and user-friendly system we have access to!

Data Usage

Service Insights provides more insight on our communities by collecting additional information.

This information can be used by:

- Capital Area Food Bank
- If your organization is TEFAP, your state agency may request data about TEFAP recipients.
    - This info sharing is similar to the states' audits of your paper records.
- Feeding America
- And you, our partners.

All information in Service Insights is powerfully protected and encrypted.

No personal information will ever be shared with anyone outside of our partner network.

Clients are not required to provide their information in Service Insights in order to receive food or services.

How it Works

Technical Requirements

- Service Insights is web-based – we can use laptops, tablets, and/or smartphones

- Compatible internet browsers
  - Safari (iPads and iPhones)
  - Google Chrome
  - Mozilla Firefox
  - NOT recommended: Internet Explorer and Microsoft Edge

Clients only need to register one time in Service Insights.

Clients are not registering at your site; they are registering in the CAFB Network.

All Partners using the system will work together to keep clients' info updated.

Partners should <u>start fresh</u> collecting information from clients during your distribution.

When you collected clients' info before, they did not know that you might enter it into the Service Insights system.

YOUR DATA YOUR RIGHTS

This pantry is switching to an electronic system to do its intake process. This means that all information that was previously collected on paper will now be saved electronically. This is a big change for this pantry, for the food bank, and most importantly for you! We understand you may have some questions and we have tried to answer them for you below. If you want to know more, you are encouraged to talk with the staff at your local pantry.

WHY THE CHANGE?

The Capital Area Food Bank is pleased to collaborate with this local pantry to modernize the intake process. By taking part in this new process and answering a few questions, you will help us reduce wait times for return visits to this pantry and help us make smarter decisions on how to serve your community.

SO WHAT'S THE NEW SYSTEM?

The system is called **Link2Feed**. It is an electronic information tool provided that makes it easier for pantries to manage information about the community they serve while fulfill reporting requirements.

DO I HAVE TO PROVIDE MY INFORMATION?

No, but in order to receive USDA/TEFAP (The Emergency Food Assistance Program), we will need to know the following information:

First and last name
Address
Number of people in your household
Your monthly income OR if you participate in any assistance programs such as SNAP/food stamps, TANF, etc.

We will also ask about your housing type, education level, and the names and dates of birth of your household members. You are not required to answer these questions to receive TEFAP, but we hope that you will choose to answer them.

WILL I HAVE TO DO THIS EVERY TIME?

No. Using Link2Feed allows us to store your information electronically and make future visits quicker. We will just ask you to verify and update your information from time to time.

Questions or concerns? Email us at **link2feed@capitalareafoodbank.org**

Together we can solve hunger

We will record whatever amount of info they are comfortable with.

If someone does not want to sign up in Service Insights at all, they should still receive food.

If your organization provides TEFAP food, you should provide a paper SDI form for these clients. They are not required to sign up in Service Insights to receive TEFAP food.

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CAFB provides equipment to support you!

- One laptop (if needed)

- A barcode scanner

- Keycards for your clients
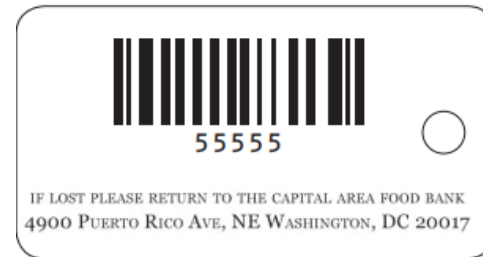
Expectations of CAFB

- Set up your organization in Service Insights

- Create users for all your volunteers using SI

- Help strategize how to use SI at your site

- Assist at your site when you "go live"

- Continuous system support

Do we have to register everyone at once?!

- No one expects you to register all your clients at one time!

- Consider a goal for each distribution day
  - Ex: "We'll register 10 clients at each distribution." "We'll register every third person in line."

- Let's start communicating with clients about the new intake system coming soon

Service Insights Demonstration
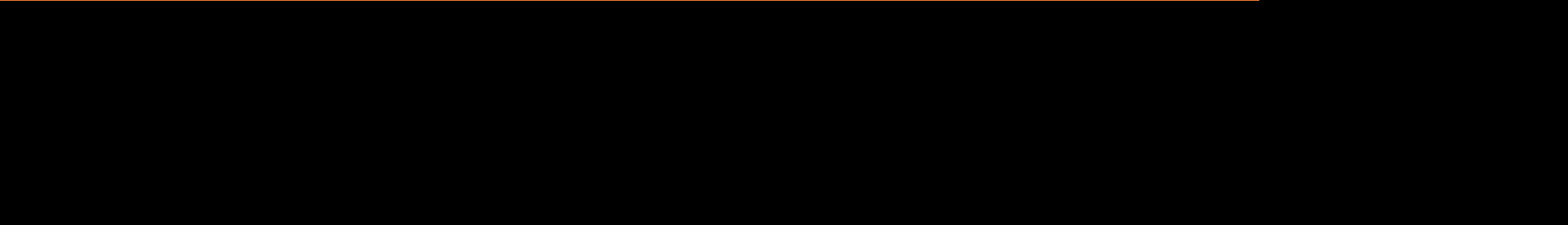
Service Insights demonstration includes:

- Logging in
- Tour the website layout
- Search for a client
- How to create a new client profile
- Return visits
- Possible duplicates
- Spur-of-the-moment events
- Anonymous Visits

Service Insights Test Site

https://training.neighborintake.org/home

Welcome

Email or Username

VATefapAdmin

Password

....

Sign In

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Reports

- **We'll meet about reports when you have data in your system!** (a few weeks from now)

- Types of data you'll get in reports:
  - # of households and individuals served
  - Age groups served
  - Areas where your clients live

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Report Example

Three-Step Onboarding Process

Training

Paper Distribution

(data entered <u>after</u> food distribution)

Live Client Intake

(data entered <u>during</u> food distribution)

Majority of Regulars are in Service Insights
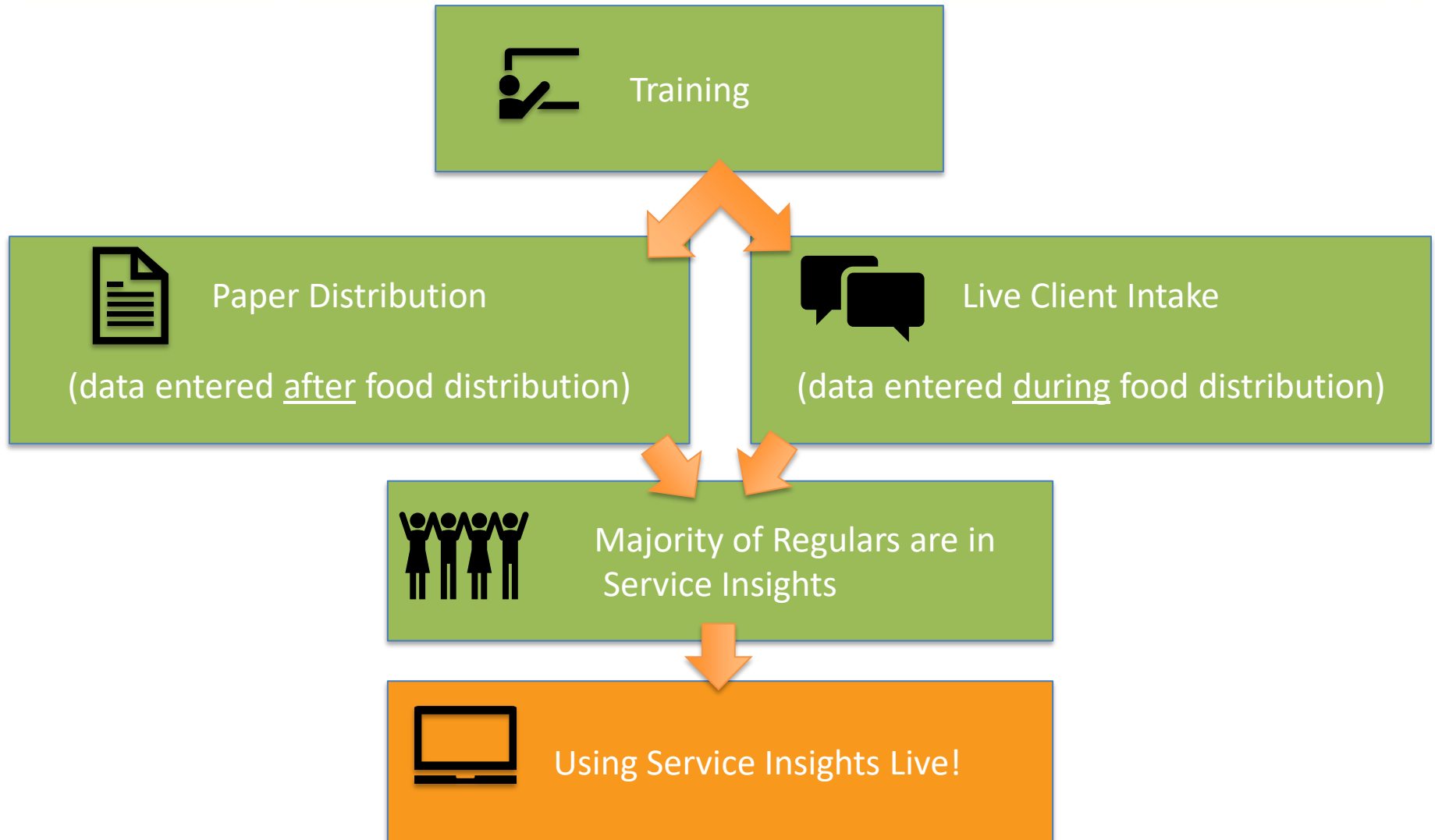
Using Service Insights Live!

CAFB Recommended!

Live client intake means that you are asking clients questions and entering their information directly into Service Insights while they are present.

Benefits

- You can go paperless
- Less work after the distribution ends
- Greatly increases accuracy of info

Required

- Multiple devices
- Multiple volunteers using NI
- Space for conversation with clients (w/privacy)

Paper intake means that you ask clients to complete paper forms and enter their info into Service Insights after your distribution ends.

- Less close contact with clients
- Can make the line go faster

Benefits

- More volunteer time after the distribution
- Need to check completed forms carefully <u>before client leaves</u>!

Required

CAFB staff will provide a test site login for all your volunteers to practice & get comfortable.

The live Service Insights site requires each user to have their own login information.

This protects clients' personal information and will provide accountability within our network.

Goals after today's training

- Each volunteer should log into the test site and create at least **3 fake client profiles & record visits.** Have fun with it!

- I will email this presentation, your User Manual, and an online form for you to complete.

- **I will follow up with your Agency Manager in about 1 week to see how it's going!** ☺ We'll schedule a time for you to receive your laptop and barcode scanner.

- After you have your equipment, we'll decide when you want to "go live" with SI. I'll be there to help! We can strategize together how you'll incorporate SI at your pantry.

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