



Troubleshooting in Service Insights

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Introduction

The purpose of this guide is to identify common problems your agency may encounter while using Service Insights and how to fix them. Many problems can be fixed by Service Insights users themselves. However, if you cannot resolve the problem on your own, please contact the Capital Area Food Bank at serviceinsights@capitalareafoodbank.org to submit a help request. CAFB staff will help you resolve the issue as soon as possible.

Common Problems

I can't log into Service Insights.

Verify that your username and password are correct. CAFB will provide each of your agency users with a username and password to log into Service Insights after you have been trained on the system. Service Insights **does not** have a "forgot username/password" feature for users to reset their information themselves. To reset this information, contact CAFB at serviceinsights@capitalareafoodbank.org.

Service Insights won't save client information.

If Service Insights allows you to enter client information as normal, but you receive an error message when trying to save information, you may be experiencing problems with your internet connection. Service Insights needs a consistent internet connection to save client information.

Verify your network connection is stable, which can be found in your device's settings. If your agency distributes food outside, your internet signal may not reach the point of service at full strength. Consider moving your internet router closer to where intake will take place, purchasing a Wi-Fi signal extender, or using a mobile device with cellular data (like a smartphone connected to 4G, 5G, or LTE) to enter client information.

I don't see the "Add New Household and Visit" button.

You will not see the orange button to add a visit if the "Visit Date" is not set to a date you distribute food. Verify that the "Visit Date" on the right-hand side is set to a date you distribute food, even if that date is in the past. (For a video explanation, see <https://youtu.be/5X1hGTy1xEg?t=8>)

CAFB will set your agency's distribution schedule in Service Insights. If your agency changes the days of your food distributions, please contact CAFB at serviceinsights@capitalareafoodbank.org.

If you need to add an event, you can do so at any time with the "Don't see the event you need? + Add New" button, which is located under "Events Today" on the home screen. For a detailed explanation, see "Ad Hoc Event Creation" in the Agency User Manual.

I can't find a client when I search for them.

- If you cannot find a client when scanning their barcode, they may not have been properly assigned a barcode upon their initial visit. You can add a new barcode during any visit by using the "Print or Add Card" field on the "Finish Visit" screen.
- When searching for clients, CAFB recommends you search for clients by barcode or phone number. Phone numbers are unique to each person and Service Insights' search feature is highly accurate when searching for phone numbers. Note that you can also search with just the last four digits of a client's phone number, although this may include other clients than the one you're searching for.
- Service Insights' search field is very sensitive to spelling. For example, if a client's home address is *1600 Pennsylvania Avenue* and you search for *1600 Pennsylvania Ave.*, it will not return any results. Using barcodes or phone numbers will show you client information most reliably.
- Verify that the drop-down menu to the left of the search bar matches the type of information you are using to search for the client. For example, if you are searching by phone number, verify that you have selected "Phone #" to the left of the search bar. Even if you enter a correct phone number, Service Insights will not display results unless "Phone #" is selected.
- Verify the information you are searching for is entered properly. Ensure that there are no spaces before or after what you type in the search field.
- Service Insights will not allow you to search for a minor. Household members under 18 will be visible only as members of a household, but you will not be able to add a visit under their name.

For a detailed explanation on the search function, see "Searching for a Neighbor" in the Resource Binder or the "Intake" section of the Agency User Manual.

A minor arrived at my agency. How should I enter their information?

If a minor is picking up food for their family and an adult in their household is registered in Service Insights, you will need the adult's name, phone number, or barcode to search for the household to add a new visit. If the family is not registered, do not take personal information from the child. You may give them a paper intake form to take home or ask if an adult can pick up next time to provide their family's info. Never ask a child to provide info on behalf of their adult family members. Do not ask minors to translate on behalf of a parent or guardian who does not speak English.

My clients do not want to provide me with information.

Clients do not need to participate in Service Insights to receive services from your agency. Clients may also choose to remain anonymous within the system. However, the more data we can collect, the better we will be able to understand and meet client needs in the future.

Many of the guidelines that define how information will be collected, stored, and shared can be found in Service Insights' Privacy Policy (found on the login screen at the bottom) or in CAFB's *Your Data Your Rights* flyer. Below are some of the major points found within those documents that may help ease client concerns about sharing their information:

- A client’s personal information will never be shared outside of the CAFB partner network without their consent. We will never share client information with law enforcement or immigration agencies.
- A client’s participation in Service Insights or their refusal to do so will not impact their ability to receive services at your site. It will not impact their eligibility for any government assistance programs they may be participating in (such as SNAP, Medicaid, etc.).
- Client information is stored securely in a password-protected database.

For a detailed explanation of anonymous client intake (with the ability to skip entering their name and address), see “Add Anonymous Visit” in the Agency User Manual.

For partners with TEFAP: Clients receiving TEFAP foods **must** provide information to verify their eligibility for the program, and you must record their visits. However, they do not need to provide this information in Service Insights to receive TEFAP food. If clients do not wish to participate in Service Insights, you must record their information on paper. Be sure to keep paper SDI (self-declaration of income) forms at your agency to allow clients to opt out of Service Insights. If any clients decline to participate in Service Insights, you will need to combine your visit totals from Service Insights with your paper records to accurately complete your monthly inventory reports.

Client intake significantly slows down our distribution. How can I make things move faster?

We want the transition to Service Insights to be as seamless as possible. Below are some suggestions that may speed up client intake:

- Register only some of your clients every day of distribution, such as every second or third client. You do not need to register all clients on the first day of service. (If you provide TEFAP food, you will need paper forms for anyone who is not being recorded in Service Insights.)
- Have multiple agency staff or volunteers conduct client intake. Service Insights can be used on any device connected to the internet, including smartphones and tablets.
- Distribute paper intake forms for clients to fill out before distribution begins or as they wait in line. Be sure to verify with the client that their information is legible and correct before they leave your agency.
- Consider moving the location of your distribution to a larger area. Having more room may help prevent your clients from getting stuck in narrow hallways as they wait for agency staff to enter others’ information into Service Insights.

Can I fill in a client’s information about their race/ethnicity and gender, or do I need to ask them?

Please ask your clients to identify their own race/ethnicity and gender for these fields. Our assumptions about how a client may identify are not always correct, and to ensure accurate collection of client data, it is best to let them speak for themselves. If clients don’t want to answer, “Don’t Know / Prefer not to answer.”

The client intake screen of Service Insights often provides a script to help us ask these questions, as well as a brief explanation of why we ask this:

Gender Identity ^

*What gender do you identify as? ?

* This is required

Why: We are asking for your gender identity to help us understand the community we serve and identify resources or programs to support them.

Male
 None of these
 Trans Male/Trans Man
 Non-binary
 Transgender
 Trans Female/Trans Woman
 Gender non-conforming

If members of your agency are uncomfortable asking these questions aloud, consider using paper intake forms. However, we must be prepared to assist clients who have trouble reading and writing, or those who have a language barrier.

My agency distributes TEFAP food. Service Insights says my client is “Not Eligible” for TEFAP food, but I know they are eligible. How should I proceed?

The user, not the system, will have the final say in whether the client is eligible. If this is a client you know to be eligible for TEFAP based on your training, select “Eligible” and proceed through intake.

If you have general questions about TEFAP eligibility, please contact your CAFB TEFAP Coordinator. If you notice that Service Insights is regularly showing eligible clients as “Ineligible” please let us know at serviceinsights@capitalareafoodbank.org so we can help.

I’m trying to search for a client, but their address on file does not match what they have told me.

First, verify that the information in Service Insights belongs to this client and not to someone with a similar name. Do other pieces of information match, such as their date of birth or phone number? Ask the client if they have moved recently, and if so, update the address to include the correct one. If these pieces of information do not match, there simply may be two clients with the same name.

The client’s address in Service Insights can be updated at any time if they have moved or if we are missing key information (like an apartment number).

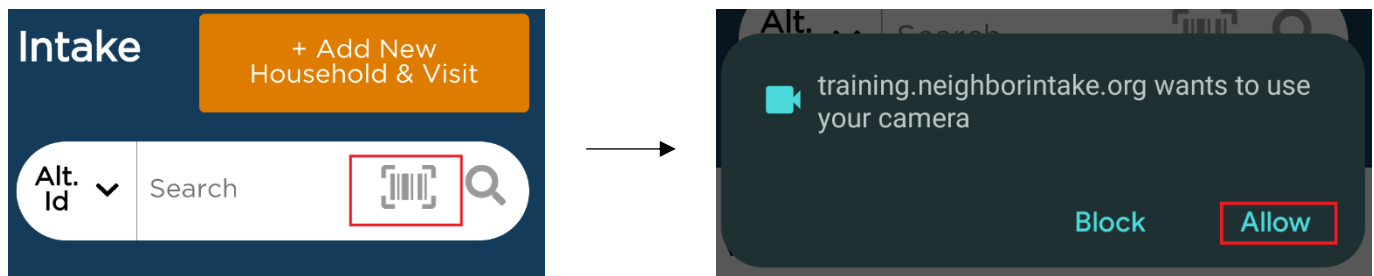
My barcode scanner isn’t working properly.

When scanning a barcode, be sure to hold the scanner a few inches away from the barcode itself. You can also check to see the status of a connected device through your device’s settings.

If the scanner still does not work, you can always type in the barcode number without using the scanner or look up a client with their phone number.

If you are performing intake on a mobile device, you may also use the device camera to scan a barcode or QR code. Select “Alt. ID” in the box to the left of the search bar. A barcode icon will appear on the right. Select this icon to use your device camera to scan a barcode and select “Allow” to allow the site to activate your device camera.

If this doesn't resolve the issue, please contact serviceinsights@capitalareafoodbank.org to request a replacement.



We gave a client a keycard, but they have misplaced it. How can they get a replacement?
We can provide a new keycard for any household who needs one. Use a new card from your supply.

When the client comes to the pantry needing a new card, search for the client and click Add Visit. On the second page of adding a new visit, enter the new card's number into the Enter or Scan Barcode field. Click Finish. Give the new card to the client.

Sometimes clients believe that having multiple cards allows them to receive additional services. We can reassure them that this is not the case. We are providing one keycard per household. You can also remind clients that they will still be served if they don't bring their keycard.

If you need more cards, please contact us at serviceinsights@capitalareafoodbank.org.

I'm trying to serve a client outside of our regular distribution hours. How do I record their visit in Service Insights?

You will be able to record a visit at any time during the day in which a distribution is scheduled, even if the visit takes place outside of the normal hours of the distribution.

To record a visit on a day in which no distribution is scheduled, scroll to the bottom of the home screen to the section labeled "Events Today". Select "Don't see the event you need? + Add New". You will be prompted to select the type of distribution, the date, and the hours of operation. Select "Save" when finished. You will now be able to add a visit. (To see this on video: <https://youtu.be/5X1hGTy1xEg?t=8>)

For a detailed explanation, see "Ad Hoc Event Creation" in the Agency User Manual.

I searched for a client and more than one profile appeared in the results. How do I proceed?

Click the plus button on the left-hand side to see more info about the client and verify which information matches the client in front of you. Remember that you can edit client information at any time based on what the client tells you.

Agency users sometimes create duplicate profiles by mistake if they do not verify that the client already exists in the system. If you believe that a profile is a duplicate of another, you can use the "Mark as duplicate" checkbox to identify them as such. Food Bank staff will later merge the duplicate profiles so only one profile remains.

I have a new volunteer who needs a login OR I have a volunteer who left our organization and need to deactivate their login.

If you need to add a new user to your agency, please email serviceinsights@capitalareafoodbank.org with the user's first name, last name, role at your agency, and their email address. We will create a profile for them and email them a password to log in.

If you need a user's account deactivated, please email serviceinsights@capitalareafoodbank.org with the name of the user whose account we should deactivate. It is important to let us know when users are no longer active, as this helps to prevent unauthorized users from accessing the information stored in Service Insights.

I've encountered a technical issue with Service Insights not covered in this guide. What should I do?

Your feedback helps improve Service Insights. Please reach out to CAFB for assistance. We will pass your problem along to the developers to request they fix it if we at the Food Bank are unable to do so.

We may ask for certain information to help us better address the problem, such as which device or browser you are using.

How can I delete or cancel a visit?

To cancel a visit that has already been recorded, first search for the client whose visit you need to cancel. In the search results, select the plus sign to the left of the client's name, then "View History". You will then see all their visits at your agency. Select "Cancel" to the right of the visit you wish to cancel.

Note that you will only be able to cancel visits that your agency recorded. You will not be able to cancel visits recorded elsewhere.

The screenshot displays the 'Household Profile' for Taylor Swift. The profile includes personal information such as Name, Address, Last Visit, Phone, and DOB. It also lists household members (Phoebe Bridgers and Jack Antonoff) and their alt IDs. The TEFAP Status is 'ELIGIBLE' with a recertification date of 08/08/2025. A 'View History' button is highlighted with a red box at the bottom of the profile card.

Clicking 'View History' leads to a table of visits. The table has columns for Visitor, Date, Location, Event Name, Services, Status, and Signature. The 'Status' column shows 'Cancelled' for several visits, and 'Cancel' buttons are visible in the rightmost column for these entries, also highlighted with a red box.

Visitor	Date	Location	Event Name	Services	Status	Signature
Taylor Swift	1/22/24	DC Choice Pantry	Daily Pantry	Food Pantry	Cancelled	No
Taylor Swift	1/22/24	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	12/12/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	12/8/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	11/29/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	11/3/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	10/11/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	10/4/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	8/8/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Taylor Swift	6/14/23	DC Choice Pantry	Daily Pantry	Food Pantry	Cancelled	No
Taylor Swift	6/14/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No
Phoebe Bridgers	4/23/23	DC Choice Pantry	Daily Pantry	Food Pantry	Served	No

Why is there a note on my client's profile?

Because multiple agencies have access to Service Insights, they may leave notes on a client that originally registered with your organization.

CAFB will also leave notes on profiles to identify data quality issues. One routine task of the CAFB Service Insights team is merging duplicate profiles. If CAFB merges the profiles of two duplicate households, we may leave a note asking you to verify that the household's information is still correct. For instance, two duplicate records may have different phone numbers, and only one can remain in the merged profile. We may leave a note asking you to confirm that the listed phone number is the correct one.

Reaching Out to CAFB

If you have been unable to resolve the problem you are experiencing, reach out to CAFB by emailing serviceinsights@capitalareafoodbank.org. Please include the following information:

- **Your agency's name.**
- **Description:** Describe the issue.
- **Browser and Device:** Specify the browser (ex: Firefox, Chrome, etc.) and device (ex: iPhone, Windows laptop, iPad, etc.) you used while encountering the problem
- **User Credentials:** Enter the Username and Password that you used when you encountered the issue.
- **Reproduction Steps:** Describe how you arrived at this problem so that we can reproduce it.
- **Screenshot:** If possible, include a screenshot of the issue.
 - *Windows:* press ctrl + prt sc
 - *Mac:* press shift + command + 3
 - *ChromeOS:* press shift + ctrl + show windows, select Screenshot, then select a size option. Some Chromebooks also have a Screenshot key.