



Using Barcodes with Service Insights

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Introduction

The Capital Area Food Bank (CAFB) has provided your agency with barcoded plastic cards to distribute to clients and a barcode scanner. Each card comes in a pair. One is a standard credit card sized card and the other is smaller and suitable for a keyring. The barcodes on each pair are identical. Whether a client brings the larger or smaller card will not impact how your agency accesses their information. These can be used to quickly access client information in Service Insights.

Role of the Barcodes

Barcodes are designed to speed up service so that agencies can simply scan a client's card to quickly access their information and record a visit.

Using barcodes does not add any additional functions onto Service Insights beyond their role to identify clients. For example, Service Insights will not display whether a client barcode has been used already at a given agency or on a given day. You can assure clients that the barcodes help make the check-in process quicker. Barcodes will never be used to deny clients services.

Alt IDs

The barcode on the plastic cards corresponds to the six-digit number which appears just below it. This number is the client's "Alt ID". When scanning a barcode to search for a client, you must ensure that your search criteria in Service Insights is set to "Alt. ID". You can be sure this the case because a barcode icon will appear to the right. This icon will not be present when attempting to search by name, phone number, or address.



Click into the "Search" box and scan the client's barcode using your USB barcode scanner. Alternatively, select the barcode icon to use your device's camera to scan a barcode. A detailed explanation on searching for individuals can be found in the User Manual or in "Searching for a Neighbor".

Other Keycards

Some clients may show you that they already have a black, CAFB-branded keycard. These cards are used by other CAFB agency partners and programs. However, you can and should continue to use the barcode they already have instead of giving them a new one. When finishing this client's initial visit in

Service Insights, rather than scanning a new barcode, simply scan (or enter the number of) their existing barcode. When this client returns, you will be able to scan their black keycard to access their information.

Lost Keycards

If a client loses their keycard, you can still access their profile by searching for their name, address, or phone number. You will also be able to give them a new keycard. Upon their next visit, simply scan in a new barcode in the “Print or Add Card” section before finishing their visit, just as you would do if this were their first visit.

QR Codes

Once a client is enrolled in Service Insights, they will receive a confirmation message by text or email if they agreed to be contacted. This message will include a QR code. A QR code is a square-shaped code that works similarly to a traditional barcode. If a client presents their QR code instead of their key card, you can scan it in the same way you would a traditional barcode. Note that because they may have the code displayed on their mobile device, the client should be sure to set the device’s brightness to the highest setting so that the code is readable.

