

Paper Intake

Summary of Responsibilities: Distribute paper intake forms to new clients.

Supplies Needed: clipboards, pens, printed intake forms in appropriate languages, a sample key card

Instructions:

1. Ask clients if they have a key card (show the card if you are having difficulty communicating)
2. Clients who do not have a key card need to complete a paper intake form to receive a key card. Give them the form on a clipboard with a pen and explain the following:
 - a. The form is for information about the person filling out the form.
 - b. The "Household Members" section is for information about people who live in the same house with them and share food with them. The client filling out the form should not list themselves as a member of their household. If there are multiple families living at one address, but they do not share food or income, they count as separate households
 - c. When they are finished, they should bring their completed form to the volunteer conducting the Barcode Distribution to receive their key card.

Barcode Distribution

Summary of Responsibilities: Double-check paper intake forms and distribute barcoded key cards to clients

Supplies Needed: pen, supply of barcoded key cards, envelope/box to store completed intake forms

Instructions:

If clients are crowding your table, make sure they form a single-file line and that they understand you will help them each. It may be useful to have separate lines: one for clients who already have a keycard and one for those who need to get one.

1. Read through the client's form to ensure they've answered each required question (marked with an * and highlighted). Ask the client for any missing answers and clarify any handwriting that is difficult to read. It is essential that data entry volunteers can read the forms, so write in answers if the client's handwriting is not legible. **Take your time with this process! If you are calm, the clients will be too.**
2. After you've double-checked the form, take a key card. Remove the sticker from the key card. Place the sticker in the box on the upper right-hand corner of the first page of the form. Alternatively, simply write the key card's barcode number in the box.
3. Give the key card to the client and make sure they know to bring the card with them every time they visit this agency. (You can even help them put it on their key ring if they have one, to help make sure they don't lose the card!)

Live Intake

Summary of Responsibilities: input client information as you verbally ask them various questions. Provide new clients with a key card.

Supplies Needed: any device capable of accessing the Internet (laptop, smartphone, tablet, etc.) supply of barcoded key cards, barcode scanner (optional)

Instructions:

If clients are crowding your table, make sure they form a single-file line and that they understand you will help them each. It may be useful to have separate lines: one for clients who already have a keycard and one for those who need to get one.

1. Log into network.neighborintake.org using the login credentials provided to you by the Food Bank. Ensure that the date in Service Insights is set to today's date.
2. *Returning clients*
 - a. First, search for the client. To search using the client's key card, click in the search box (your cursor should be flashing) and scan their key card. Alternatively, you can search by the client's phone number. Be sure "Phone #" is selected to the left of the search bar.
 - b. Locate the client in the search results. Select "Add Visit".
 - c. Ask the client if any of their information has changed since their last visit. Service Insights may also prompt you to ask several more questions if this is the client's second visit.
 - d. Scroll to the bottom of the page and select "Save and Continue".
 - e. On the next page, scroll to the bottom and select "Finish".
3. *New clients*
 - a. From the home screen, select the orange box that reads "+ Add New Household & Visit".
 - b. Verbally ask the client all the required questions on the first page of the online intake form. The fields marked with an asterisk (*) are required.
 - c. In the field labeled "Print or Add Card", click in the white box (your cursor should be flashing). Take a key card and scan it. The barcode number should appear in the box. Alternatively, simply type the six-digit number on the key card into the box.
 - d. Select "Finish".
 - a. Give the key card to the client and make sure they know to bring the card with them every time they visit this agency. (You can even help them put it on their key ring if they have one, to help make sure they don't lose the card!)