

# Service Insights Onboarding Steps

## Service Insights Training

Capital Area Food Bank staff will train you and your agency's staff or volunteers on how to use Service Insights. This 90-minute orientation is held remotely over Zoom, and CAFB holds several sessions each month. You can register for a training session with this link: <https://calendly.com/d/dh9-pcy-rmy>

## Completion of Your Setup Forms (1-7 days after training)

After training, CAFB staff will email you a link to complete the Agency Setup Form. This is a web form that provides us with all the information needed to create your agency and users in Service Insights. This form also lets us know how much equipment to bring to you.

## Site Visit to Provide Equipment (1-2 weeks after training)

CAFB staff will visit your organization to drop off the equipment needed to operate Service Insights. This will include a laptop, key cards for clients, a barcode scanner, agency resource binder, paper intake forms, and informational fliers. Our staff also use this visit to understand the physical layout of your agency, where clients gather, where food is distributed, and where client check-in can take place. We will also schedule a time to "go live" – when we'll begin using Service Insights the first time.

## Communication with Clients and Volunteers / Staff (2-4 weeks after training)

Your agency team will then begin informing clients about the upcoming change to Service Insights. The Food Bank will provide you with fliers you may provide to clients, you may create your own, or you can use your organization's website or social media presence to provide notice of the change. This helps set client expectations so that they are not surprised when we begin asking them for some basic information.

Your agency will also need to train staff or volunteers on how to use Service Insights. CAFB will provide you with a recording of your original training to share with your team. The agency resource binder provides many written guides on how to use Service Insights.

## Going Live (4-6 weeks after training)

When you begin using Service Insights for the first time, CAFB staff will be present to support. We will help enroll clients, answer questions, and ensure your staff or volunteers are confident in their ability to use Service Insights.

## Operating Service Insights (indefinitely into the future)

Starting on your second distribution using Service Insights, you will be enrolling new clients and checking in your returning clients. As time goes on and you enroll more of your "regulars", most of your time will be spent simply checking in the returning clients and verifying the accuracy of their information.

## Reporting (1-3 months after going live)

CAFB will hold additional training sessions on how to make the most of Service Insights' reporting tools. This training will also be held remotely over Zoom. While optional, attendance is encouraged, especially if your agency plans to use information gathered from Service Insights for communications or grant applications / compliance.

Due to TEFAP's strict reporting requirements, CAFB will assist TEFAP shopping partners with reporting shortly after they begin using Service Insights.

Questions? Email us at [ServiceInsights@capitalareafoodbank.org](mailto:ServiceInsights@capitalareafoodbank.org)