

Service Insights on MealConnect User Manual – Agency Users

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WELCOME

ABOUT US

Feeding America

Feeding America, a non-profit organization, is the nation's largest domestic hunger-relief organization—a powerful and efficient network of 200 food banks across the country. Our mission is to advance change in America by ensuring equitable access to nutritious food for all in partnership with food banks, policymakers, supporters, and the communities we serve. For more information about Feeding America, visit us at www.feedingamerica.org.

The Service Insights Initiative

The Service Insights Initiative is a network-wide approach to electronically collect consistent data from the people we serve at partner agencies and food banks across the country. Collecting this data electronically using cloud-based solutions, like this Service Insights on MealConnect platform, will enable Feeding America, food banks, and partner agencies to view data in real-time, providing valuable insights at a local, regional, state, and national level. Over time, these insights will help us understand how to better serve and meet the needs of all our neighbors across the country.

Service Insights on MealConnect Platform

It starts with gathering data that will be kept confidential and secure. Partner agencies collect and enter neighbors' basic household and demographic information during intake. Food banks and agencies can subsequently glean timely, actionable insights to holistically address the needs of neighbors. Our future vision is that neighbors will be able to use the platform to find and access local resources, including making a reservation or appointment at a partner agency.

Food banks get real-time data about the people they serve to make data-driven decisions and respond to emerging needs—all at no cost. Agencies get deeper insights to adapt and improve services, all while saving time on reporting and compliance. As a network, we will collectively harness nationwide insights to improve program delivery, drive national and local policy change, and advance toward our shared outcomes.

Through an expanded national partnership with the Tableau Foundation, we will be able to provide all food bank and agency users with seamless, real-time access to their data through interactive, best-in-class data visualizations - democratizing data across the country.

This platform is the result of decades of collective experience and learning to improve, build, and implement a solution that meets the vast array of needs amongst food banks and agencies across the country. We will continue to improve and enhance the platform over time based on network needs.

About this guide

This guide has been adapted from the original Feeding America user manual to better suite the needs of the partners of the Capital Area Food Bank. While this guide is comprehensive, it does not detail every feature available in Service Insights.

ETHICAL DATA COLLECTION

User Confidentiality Agreements

In order to protect neighbors and their personal data, food bank administrators are encouraged to collect signed [User Confidentiality Agreements](#) from all users, including other food bank users and agency users. Although it is not legally binding, the purpose of this agreement is to commit an individual user to keep neighbors' personal data confidential.

By executing this agreement with all software users, food banks can strive to ensure that any person who encounters the data can also be held responsible for protecting its security. For example, different teams at the food bank beyond the primary project team may end up accessing data, such as fundraising or communications staff. At the agency level, both agency directors and individual volunteers conducting intake may be using the software. While the agreement cannot prevent data from being disclosed, it can help raise awareness of the need to keep information confidential and encourage users to abide by the agreement.

HIPAA

Food banks across the country partner with local health care providers and payers to ensure that neighbors and patients with health concerns have access to healthy, nutritious foods. However, these collaborations between food banks and health care often require communication about the needs of patients and neighbors served. With more communication between food banks and the health care system comes increased responsibility to think critically about how information that relates to patients and neighbors is shared and protected.

Health care providers and payers are legally required to keep patient information private and secure. Federal legal obligations have been embodied in federal law through [HIPAA](#), the Health Insurance Portability and Accountability Act of 1996. However, a food bank generally does not meet the legal definition of an organization subject to HIPAA (i.e., a Covered Entity or Business Associate). In other words, a food bank is not generally subject to HIPAA based on the provision of food, general nutrition education, gathering self-reported information from neighbors, and related activities.

For more information about HIPAA or food bank/health care partnerships, please review [*Food Banks as Partners in Health Promotion: Navigating HIPAA*](#) visit the [United States Department of Health and Human Services \(HHS\) website](#), and/or consult an attorney.

CONTACT & TECHNICAL SUPPORT

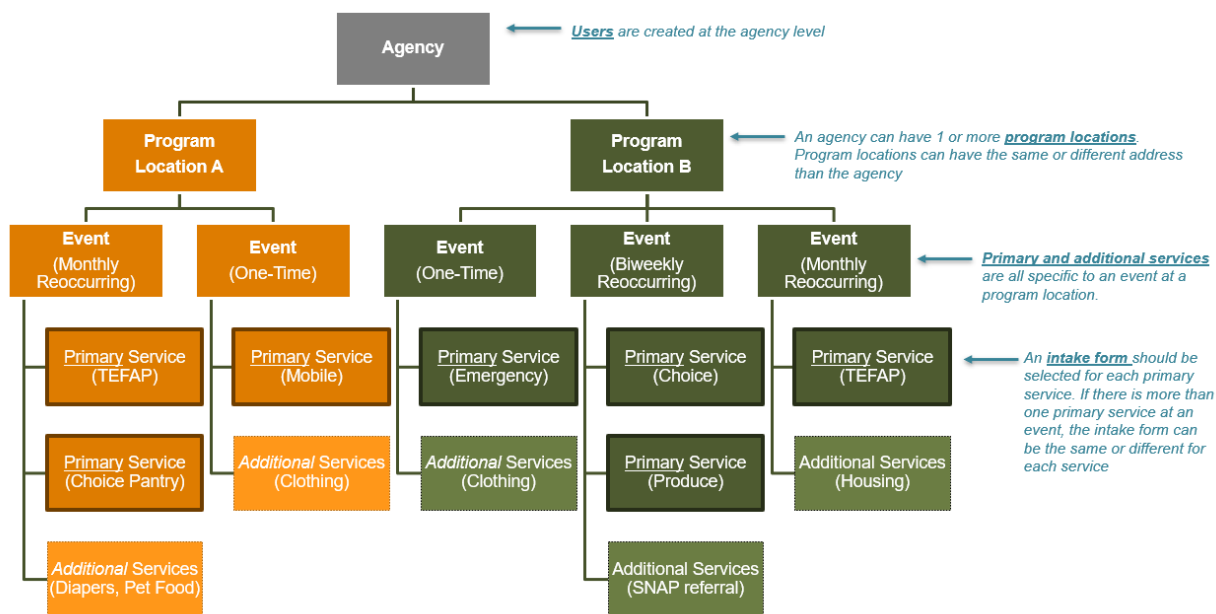
If you have technical issues or need support, please contact the Capital Area Food Bank at serviceinsights@capitalareafoodbank.org.

GETTING STARTED

To quickly get up and running so that you and your team can begin using the Service Insights on MealConnect platform, here are the key things you'll need to know.

ORGANIZATIONAL STRUCTURE

The Service Insights on MealConnect platform is organized in the following way: Each food bank will have multiple agencies. Each agency can have one or more Program Locations. The Program Locations are where Events (i.e., food distributions) take place, and each Event can offer one or more Services. Services are broken down into two overarching categories, Primary Services (often a grocery distribution or regulated service, such as TEFAP) and Additional Services (often non-regulated or non-food services). The visual below includes an example of this hierarchy.



KEY TERMS

Below are some of the key terms used throughout the platform.

Agency: An agency is a partner with whom your food bank works to serve neighbors. An agency may have one or more program locations.

Event: An event is a distribution at a specific program location.

Household: A household is made up of all neighbors living in a housing unit who will benefit from the services provided at a visit. A household can be one or more neighbors and excludes group homes and shelters. Profiles are set up at the household level in the system.

Intake Form: Intake forms establish the number and type of intake questions asked at each event as well as which, if any, regulatory signature is captured (such as for TEFAP).

Neighbor: A neighbor is anyone receiving services during an event. One or more neighbors make up a household. All neighbors are set up with a household profile in the system. **(Note that Feeding America uses the term *neighbor* to refer to those receiving services at your agency; the Capital Area Food Bank often uses *client*. These terms are interchangeable.)**

Program Location: A program location is a specific program or distribution site operated by an agency. Program locations can have the same or a different address as the agency or each other.

Service: Services are the categories of food and other assistance being provided to households at an event. Services are divided into *primary services* and *additional services*.

Primary service: The main food or assistance provided to households at a program location during an event. Intake forms can be configured to support different types of primary services.

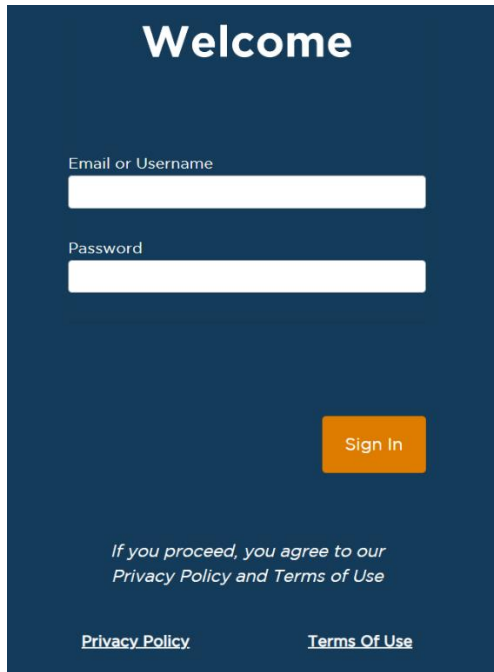
Additional service: Any additional resources or assistance provided to households at a program location during an event. These are often non-regulated or non-food related services that are supplemental to the primary service being offered.

User: A user is someone with the ability to log into the system and perform various tasks.

Visit: A visit is recorded any time a household is served at an event. Multiple primary and secondary services can be provided to a household during a visit. All active members of the household are recorded as benefiting from that visit.

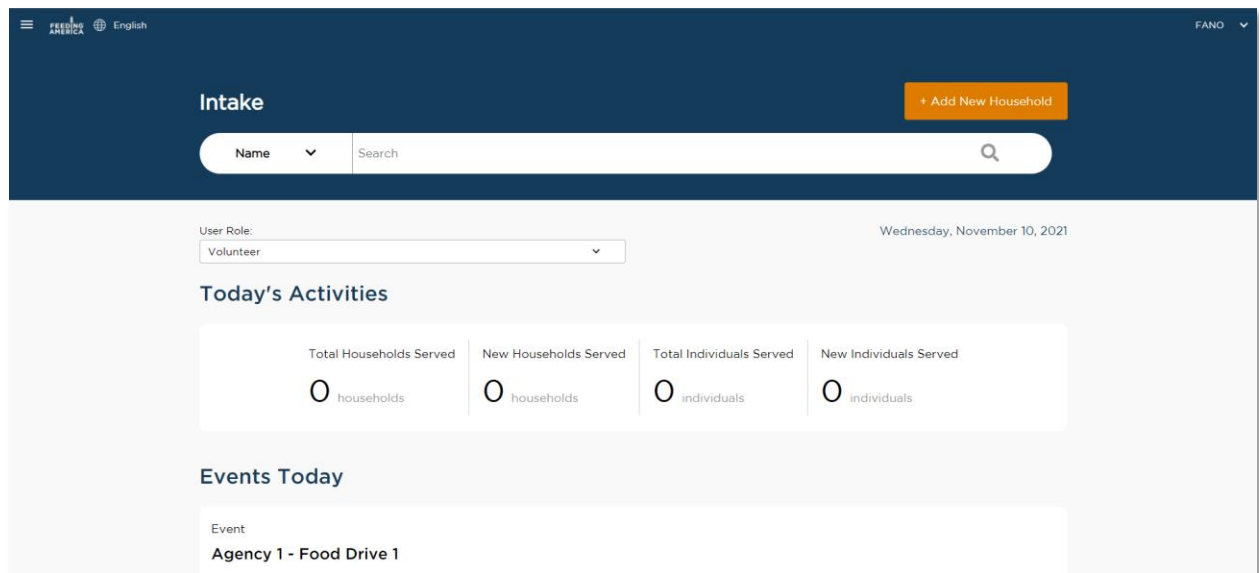
LOGGING IN

To log in to the training site, go to training.neighborintake.org. To log into the live site, go to network.neighborintake.org. Enter your **Email** address or **Username** and **Password** assigned by your administrator. Click **Sign In**.



HOME SCREEN


Once you log in, you will be taken to a home screen with a snapshot of recent activity. This is also where you will begin intake during an event.

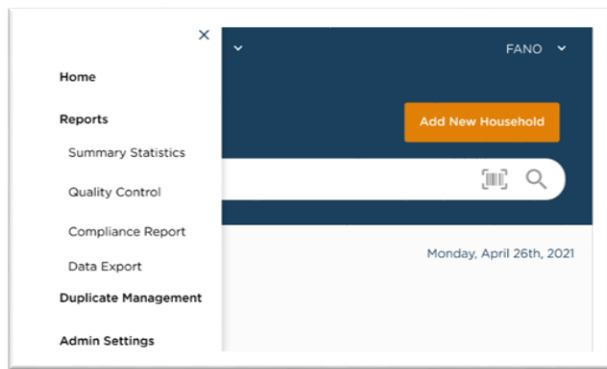


The home screen displays:

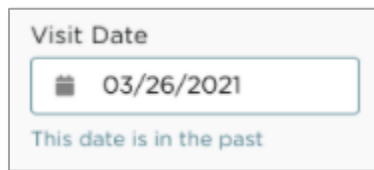
- **Today's Activity** aggregated from across your agency network and displayed by:
 - Total Households Served

- New Households Served (*new households had their first visit recorded at your agency on that day*)
- Total Individuals Served
- New Individuals Served
- Age Groups Served (children, adults, and seniors)
- **Events Today** occurring across your program location(s) with details about reservations
- **Services Offered Today** broken out by Primary Services and Additional Services, occurring across your program location(s)
- A **Calendar** that allows you to compare daily service trends from across your program location(s). You can use the backward and forward arrows to view different days. *Note: the calendar will not be visible to Intake Users accounts.*

The home screen also contains the [Search](#) bar, [Add A New Household](#) button, and access to **Administrative Settings** and **Reports** by clicking on the hamburger menu  on the top left.



The **Visit Date** is also on the top right above Today’s Activity. This date should always be the current date, unless you are recording a back-dated visit (see [Add a Back-Dated Visit](#) section), in which case you will see this notification:



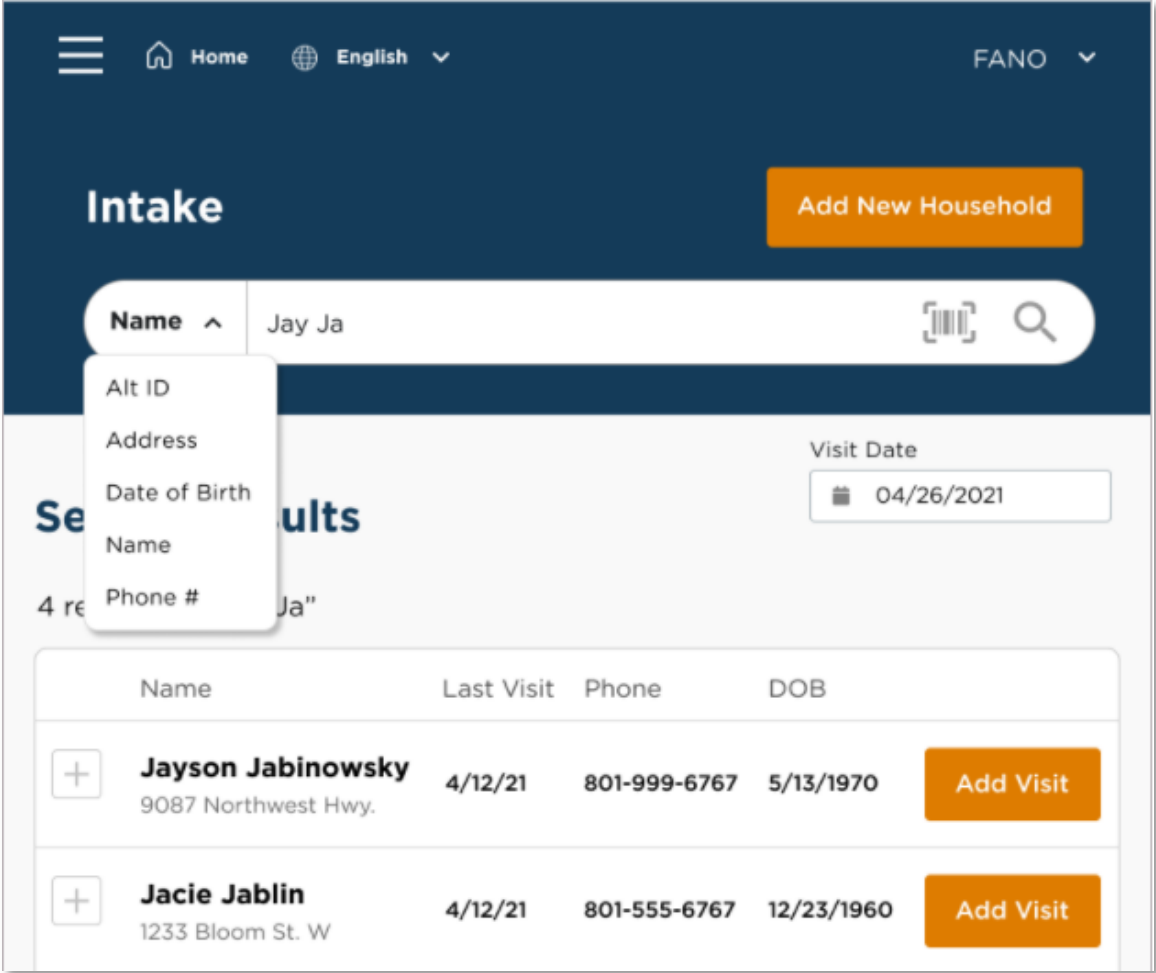
If at any point you’d like to return to the **Home Screen**, click on the house logo on the top left. To log out, select the account name in the top right, then select “Logout”.

INTAKE

Intake is the process to create unique profiles for each household you serve and record the services they receive at your agency’s events, including regulated services, such as TEFAP, and non-regulated services. You can also manage household profiles and visit records for past events through the intake function.

SEARCH

The Search function allows you to identify whether a neighbor already exists in the system before you begin intake. Neighbors will be included in search results if their address ZIP Code matches the ZIP 3s (first three digits of a ZIP Code) that the Food Bank tagged to your Program Location during administrative setup. CAFB sets up each agency so that your search can include anyone in our service area.



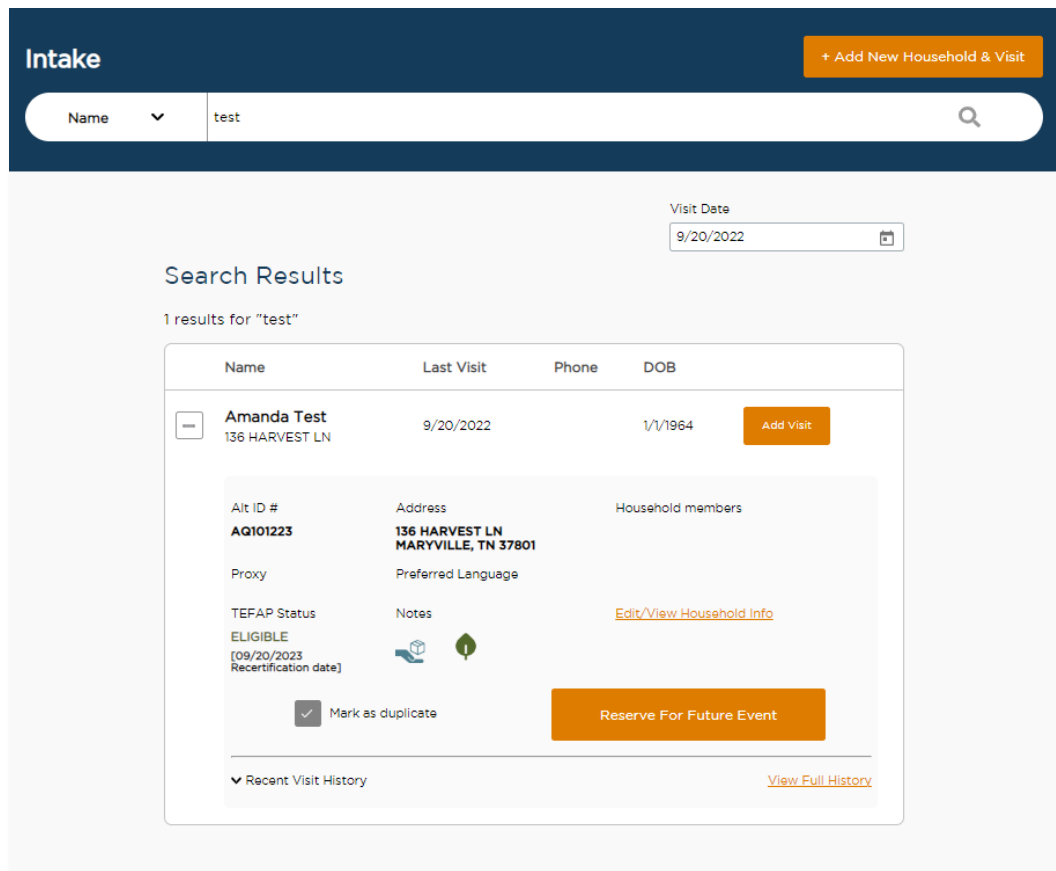
1. From the home screen, begin by searching the system for a neighbor's profile. The **search** bar is located at the top of the screen. You can search the system for a neighbor's profile by:
 - **Alt. ID:** use this for quick check-in if the returning neighbor has a barcode card or Alt. ID number. When selected, the barcode icon will appear on the right-hand side of the search bar. Click on the barcode icon to activate your device's camera or external barcode scanner. Scanning a barcode card will pull up the neighbor's household profile. You can also type an Alt. ID number directly into the search bar if the neighbor knows their Alt. ID number but doesn't have their card. If you are on a mobile device such as a phone or tablet, you can also use your device camera to scan a QR code just as you would a barcode.



- **Address:** you can search for a neighbor's street address (e.g., *5 Test Dr.*). However, you cannot search by city, state, or ZIP code. Be sure to search using the exact spelling of the address. For example, if someone lives at *38 Peach Street* and you search for *38 Peach Road*, you may not see any results.
 - **Date of Birth:** your search must be in the format MM-DD-YYYY, MM/DD/YYYY, MM.DD.YYYY or MMDDYYYY.
 - **Name:** you can search by last name (e.g., *Doe*), first and last name (e.g., *John Doe*) or last, first name (e.g., *Doe, John*). You can use a partial name search.
 - **Phone #:** your search must be in the format 123-123-4444, 1231234444, or the last 4 digits (e.g., *4444*).
2. Your search results will show key information about each neighbor, including name, address, phone #, date of birth, household members' names, and last visit date, amongst other things.

3. From the search results, you can also:

- [Add a Return Visit](#)
- Add a Reservation
- [Edit/View Household Info](#)
- [Household Visit History](#)
- Mark as duplicate



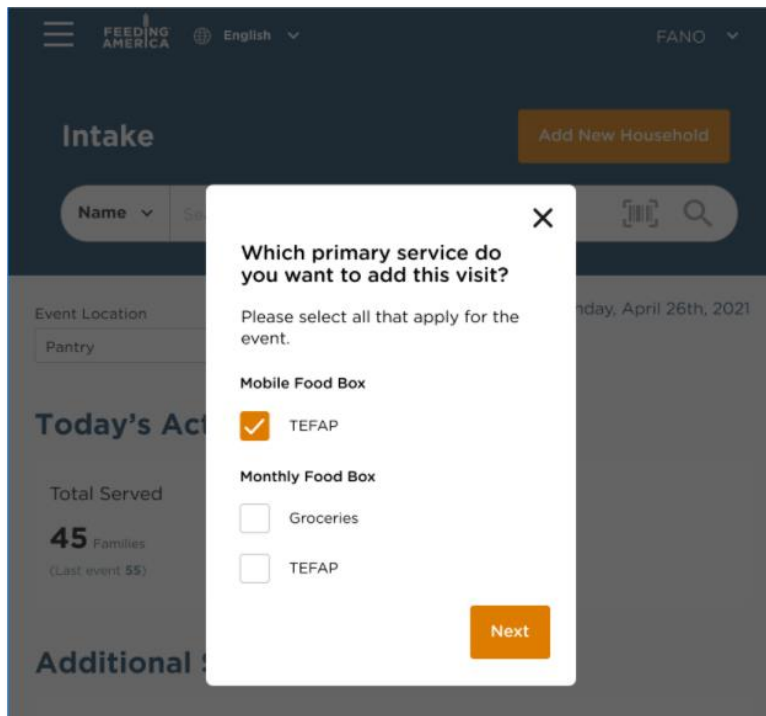
ADD A NEW HOUSEHOLD

Add New Household is the process you complete to record a visit for a new household during an event.

1. From the home screen, click the **Add New Household** button on the top right of the home screen. **To avoid creating a duplicate profile, first search for the household to confirm that they haven't already been added to the system by your agency or another in your network.**

+ Add New Household

2. Choose the **primary service(s)** the neighbor is receiving. This will inform the **intake form** you complete with the neighbor. If your program location only has one primary service at an event, you will still need to select that service. Click **Next** to begin adding the neighbor's household information.



The screenshot shows the FEEDING AMERICA intake form interface. At the top, there is a navigation bar with the FEEDING AMERICA logo, a language dropdown set to 'English', and a location dropdown set to 'FANO'. Below the navigation bar, the word 'Intake' is displayed in large text. To the right of 'Intake' is a button labeled 'Add New Household'. Below 'Intake' is a search bar with a dropdown menu labeled 'Name'. A modal dialog box is open in the center of the screen, titled 'Which primary service do you want to add this visit?'. The dialog contains the instruction 'Please select all that apply for the event.' and two sections of options: 'Mobile Food Box' with a checked checkbox for 'TEFAP', and 'Monthly Food Box' with unchecked checkboxes for 'Groceries' and 'TEFAP'. A 'Next' button is located at the bottom right of the dialog. In the background, the form shows 'Event Location' as 'Pantry', 'Today's Act' as 'Total Served 45 Families (Last event 55)', and 'Additional' information.

3. For non-regulated services (i.e., everything except TEFAP), there are 2 steps to adding a new household:
 1. Household Info
 2. Finish Visit

The screenshot shows a web form titled "Add New Household" with a progress indicator showing "1 Household Info" and "2 Finish Visit". The "Basic Information" section contains the following fields:

- First Name* (text input)
- Middle Name (Initial) (text input)
- Last Name* (text input)
- Suffix (dropdown menu with "Select" option)
- Anonymous (checkbox)
- Date of Birth* (date picker)
- Age* (text input)
- OR (text label)

4. On the **Household Info** screen, you will ask the neighbor for their basic information and any additional questions used by your food bank and/or agency. The full list of questions is below (* = required), but the list you see under Household Info will be pre-determined by your food bank, agency, and the specific intake form you are using.

- **Basic information**

- **Name***: First and Last name are required unless the neighbor requests to be [Anonymous](#)
- **Date of Birth or Age***: Age is required if date of birth is unknown; date of birth will be estimated as 1/1/YYYY.

This close-up shows the "Date of Birth" field with a calendar icon and the date "1/1/1976", and the "Age" field with the value "45". An "OR" label is positioned between the two fields. Below the fields, a note states: "* DOB has been estimated".

- **Contact**

- **Address***: Address will auto-populate as you type; you can click on the correct address once it appears and all the address fields will automatically fill in. Select **No fixed address** if the neighbor does not have a current address. When selected, your agency's main address will be automatically entered in the address field.

Contact

*Address
 No fixed address ?

* This is required

Apartment, Floor, etc.

*City *State *ZIP

*County

Email Address
 Ok to contact ?

Phone #
 Ok to contact ? No phone

What method of communication do you prefer?

Text Call Email

- **A Note on Counties:** Clicking on an address suggestion will populate the other address fields. However, the “County” field will often remain blank for agencies in Washington, DC (which has wards, not counties) and Virginia (since many cities are independent and are not part of a county). Because a county is needed to continue, DC agencies may type the neighbor’s ward as their county (“Ward 1”, “Ward 7”, etc.). Virginia agencies may use the neighbor’s city name as their county if no county appears automatically.
- **Email Address:** Select **Ok to contact** if the neighbor is okay with your agency emailing them.
- **Phone Number*:** Select **Ok to contact** if the neighbor is okay with your agency calling or texting them. If a neighbor does not have a phone number, ask them to provide one of a friend or family member or check No phone. Phone numbers are an important method of contact for food recall information.
- **Preferred Communication Methods(s)**
- **Gender Identity***
- **Race or Ethnicity***
- **Household Member Count*:** use the orange + and - buttons to indicate the number of *additional* adults, children, and seniors who are in the household and will benefit from the service provided; you can also type the number directly into the box. For each household member, a field will pop up with space to enter additional info about them:

- **Name***: This will autofill with “Adult/Child/Senior” and the head of household’s last name. You can write over these.
- **Date of Birth or Age***
- **Gender Identity**
- **Race or Ethnicity**

Household

How many people in your household, not including yourself, will benefit from the services provided today? [?](#)

Adults (18-59 yrs.)

Children (0-17 yrs.)

Seniors (60+ yrs.)

Adults

First Name* Middle Name (Initial) Last Name*

Suffix Date of Birth* OR Age*

[Additional Info](#) ▾

Children

First Name* Middle Name (Initial) Last Name*

Suffix Date of Birth* OR Age*

[Additional Info](#) ▲

What is their gender identity?

Male Female Transgender

None of these Don't know / Prefer not to answer

What is their race or ethnicity? (select all that apply)

White Hispanic, Latino, or Spanish Black or African American

Asian American Indian or Alaska Native Middle Eastern or North African

Native Hawaiian or Other Pacific Islander Some other race or ethnicity Don't Know / Prefer not to answer

- **Proxy**: Select “yes” if there someone outside of the neighbor’s household is authorized to pick up food for them. Types of proxies include general proxy, case manager, authorized representative, and other.
- **Household Receipt of SNAP***
- **Other Government Programs**
- **Employment Status**
- **Household Disability Status**
- **Household Monthly Income**
- **Household Military Status**

- Household Dietary Factors or Concerns
- Household Health Conditions
- Household Food Insecurity
- Assistance Needs
- **Notes:** you can record additional information about a neighbor's experience, needs, preferences, or follow-up items. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.

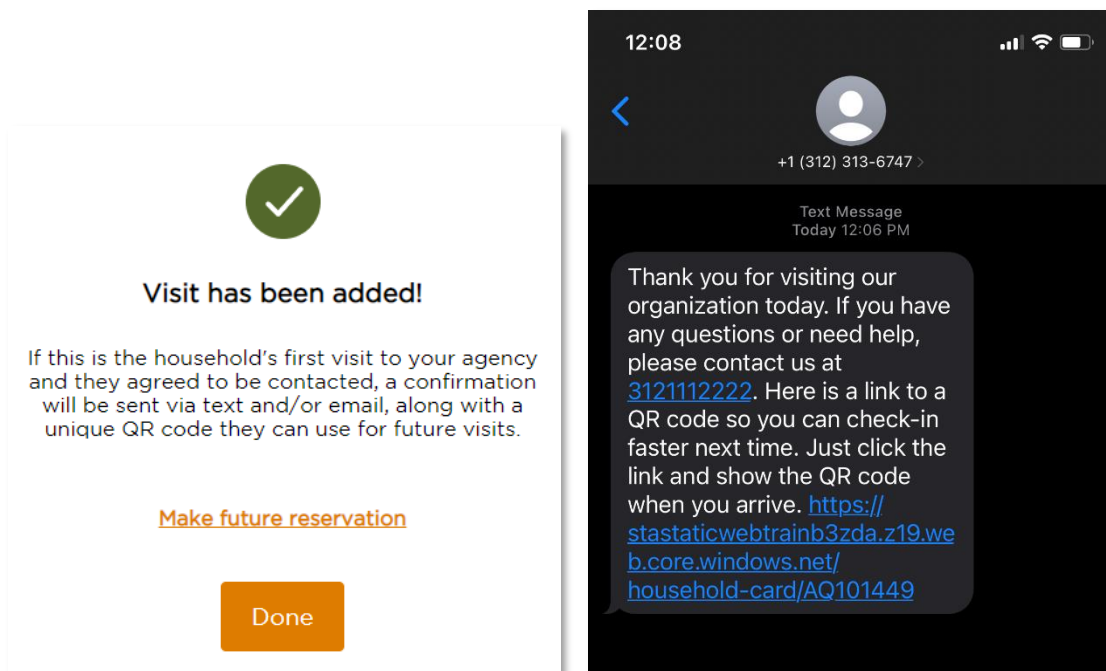
Additional Notes ?

Mark this note as private (Show only to my organization)

5. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.
6. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.
 - **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
 - a. Add Pounds, Pieces, Meals and/or Dollars
 - **Add Additional Services to Visit:** select any additional services provided to the neighbor; this list is pre-set for each event.
 - a. Add Pounds, Pieces, Meals and/or Dollars
 - **Print or Add Card:** A new or existing barcode and QR card can be used to make return visits a simple one-step process.
 - a. Choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
 - b. Choose **Enter or Scan Barcode** to link an existing card to the household's account, such as a neighbor's grocery store shopper card, library card, or other barcode card. You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device's camera or barcode scanner.

You can have multiple new and existing barcodes associated with a household's account. A barcode card can be used at any agency using the system.

7. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).
8. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.



At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

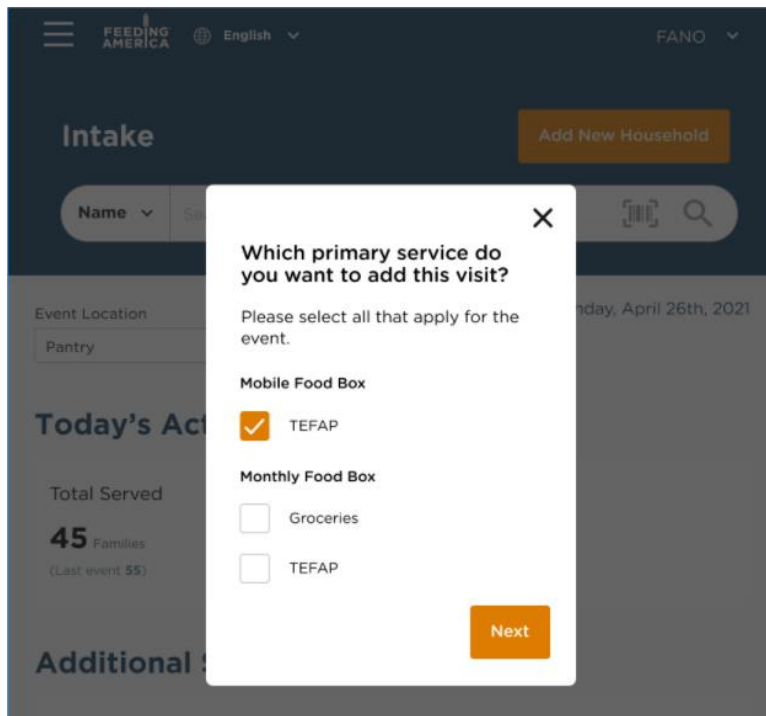
ADD A NEW HOUSEHOLD (VIRGINIA TEFAP)

Add New Household is the process you complete to record a visit for a new household during an event.

1. From the home screen, click the **Add New Household** button on the top right of the home screen. **To avoid creating a duplicate profile, first search for the household to confirm that they haven't already been added to the system by your agency or another in your network.**

+ Add New Household

2. Choose the **primary service(s)** the neighbor is receiving. For a TEFAP visit, the primary service must be a TEFAP service so that the TEFAP **intake form** is activated. If your program location only has one primary service at an event, you will still need to select that service. Click **Next** to begin adding the neighbor's household information.



The screenshot shows the FEEDING AMERICA Intake form. A modal dialog is open with the title "Which primary service do you want to add this visit?". The dialog asks the user to select all that apply for the event. Under "Mobile Food Box", the "TEFAP" option is selected with a checked checkbox. Under "Monthly Food Box", the "Groceries" and "TEFAP" options are not selected, with unchecked checkboxes. A "Next" button is visible at the bottom right of the dialog. The background shows the "Intake" form with a search bar, event location "Pantry", and statistics for "Today's Act" showing 45 Families served.

3. For TEFAP, there are 4 steps to adding a new household:
 1. Eligibility
 2. Signature
 3. Household Info
 4. Finish Visit

4. On the **Eligibility** screen, you will ask the neighbor for their basic information and any questions required by your state to screen for TEFAP eligibility. All fields marked with a * are required.

- **Basic information**

- **Name*:** First and Last name are required
- **Date of Birth or Age*:** Age is required if date of birth is unknown; date of birth will be estimated as 1/1/YYYY

- **Contact**

- **Address*:** Address will auto-populate as you type; you can click on the correct address once it appears, and all the address fields will automatically fill in. Select **No fixed address** if the neighbor does not have a current address.
- **A Note on Counties:** Clicking on an address suggestion will populate the other address fields. However, the “County” field will sometimes remain blank for Virginia agencies (since many cities are independent and are not part of a county). Because a county is needed to continue, you may use the neighbor’s city name as their county if no county appears automatically.
- **Email Address:** Select **Ok to contact** if the neighbor is okay with your agency emailing them.
- **Phone Number*:** Select **Ok to contact** if the neighbor is okay with your agency calling or texting them. If a neighbor does not have a phone number, ask them to

provide one of a friend or family member or check No phone. Phone numbers are an important method of contact for food recall information.

- Preferred Method(s) of communication

Contact

Address

 No fixed address [?](#)

Apartment, Floor, etc.

City* **State*** **ZIP***

County*

Email Address

 Ok to contact [?](#)

Phone #

 Ok to contact [?](#)

What method of communication do you prefer?

Text Call Email

- **Household Member Count***: use the orange + and - buttons to indicate the number of *additional* adults, children, and seniors who are in the household and will benefit from the TEFAP service; you can also type the number directly into the box. For each household member, a field will pop up with space to enter additional info about them:
 - **Name***: This will autofill with “Adult/Child/Senior” and the head of household’s last name. You can write over these.
 - **Date of Birth or Age***: Age is required if date of birth is unknown; date of birth will be estimated as 1/1/YYYY
 - **Gender Identity**
 - **Race or Ethnicity**

Household

How many people in your household, not including yourself, will benefit from the services provided today? [?](#)

Adults (18-59 yrs.) Children (0-17 yrs.) Seniors (60+ yrs.)

Adults

First Name* Middle Name (Initial) Last Name*

Suffix Date of Birth* OR Age*

[Additional Info](#) ▾

Children

First Name* Middle Name (Initial) Last Name*

Suffix Date of Birth* OR Age*

[Additional Info](#) ▲

What is their gender identity?

Male Female Transgender

None of these Don't know / Prefer not to answer

What is their race or ethnicity? (select all that apply)

White Hispanic, Latino, or Spanish Black or African American

Asian American Indian or Alaska Native Middle Eastern or North African

Native Hawaiian or Other Pacific Islander Some other race or ethnicity Don't Know / Prefer not to answer

- **Proxy:** Select “yes” if there someone outside of the neighbor’s household is authorized to pick up TEFAP for them. Types of proxies include general proxy, case manager, authorized representative, and other.
- **Household Receipt of SNAP***
- **Other Government Programs:** This list will, at a minimum, align with any categorical eligibility programs in your state. Additional programs can be optionally included. If the neighbor’s household qualifies for TEFAP based on categorical eligibility, the system will flag this automatically.
- **Income:** to qualify for TEFAP, the neighbor’s household income must be lower than a set amount in each state, based on household size. This amount has been automatically programmed into the system to display a per month and per year amount.
- **Program Eligibility:** based on the above information, Service Insights will compute whether it believes the neighbor is eligible for TEFAP. In Virginia, participation in SNAP or TANF will automatically qualify a neighbor for TEFAP. Medicaid or SSI are also automatic

qualifiers, but only if their household size is 1 (i.e., they live alone). Neighbors can also qualify based on income.

5. Once you confirm that the neighbor is eligible for TEFAP, click **Save and Continue**. If you choose to **Cancel**, all information entered will be lost. **Note: It is up to the intake worker to determine eligibility based on the neighbor's answers. Service Insights will not prevent you from continuing to the Signature page even if the neighbor's information does not qualify them for TEFAP.**
6. You will be taken to the **Signature** screen.
 - You will first see a recap of the neighbor's eligibility information: name, contact, address, household size, and income limit. Please confirm that this is correct.
 - **Signee***: Select the person who is there in-person to pick up the TEFAP food. The drop-down list will display all active household members over 18 years old along with any active proxies.
 - **Signature Type***: Select the neighbor's preferred signature method. The drop-down list will display all accepted signature types for TEFAP in your state.

I certify that I have willingly shared the information above, meet the monthly income guidelines, and/or am in need of food assistance.

Signee*
Minnie Mouse

Date
11/17/2021

Signature Type*
On Screen Sign

Sign

USDA Nondiscrimination Statement
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To file a program complaint of discrimination, complete

1. Mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410
2. Fax: (202) 690-7442; or
3. Email: program.intake@usda.gov

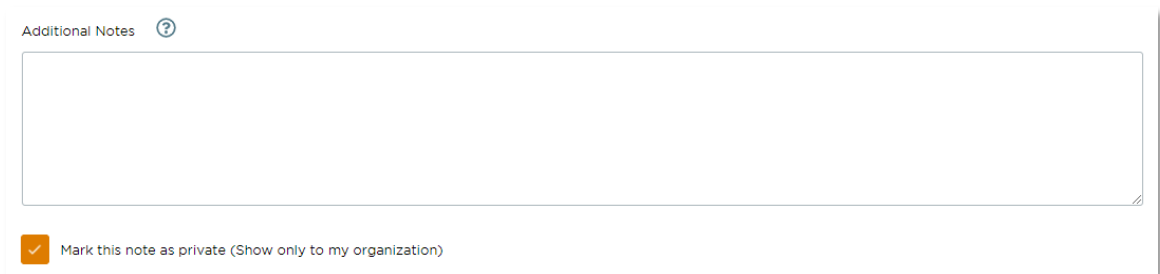
*You must fill out all required fields in order to continue. All information will be saved.

Cancel **Save and Continue**

7. Virginia has waived the signature requirement due to the COVID-19 pandemic. Instead of having the neighbor sign their name, simply sign "COVID" on the signature screen. Click **Save and Continue**. If you choose to **Cancel**, all information entered will be lost.

8. You will be taken to the **Household Info** screen, where you can ask any additional questions used by your food bank and/or agency that are not required for TEFAP. **At the top of this page, you will see a header that says, “The following questions are optional and will not impact your TEFAP service.”** It should be made clear to the neighbor that this information is in addition to the TEFAP regulations and will have no impact on their qualification for services. The full list of questions is below (* = required), but the list you see under Household Info will be pre-determined by your food bank and the specific intake form you are using.

- **Gender Identity***
- **Race or Ethnicity***
- **Living Situation**
- **Preferred Language(s)**
- **Employment Status**
- **Household Disability Status**
- **Household Monthly Income**
- **Household Military Status**
- **Household Dietary Factors or Concerns**
- **Household Health Conditions**
- **Household Food Insecurity**
- **Assistance Needs**
- **Notes:** you can record additional information about a neighbor's experience, needs, preferences, or follow-up items. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.



Additional Notes ?

Mark this note as private (Show only to my organization)

9. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.

10. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.

< Back TEFAP date last served: 9/20/22

Amanda Test

Eligibility
 Signature
 Household Info
 4 Finish Visit

Primary Service Provided ^

CSFP Application Assistance

Pounds Pieces Dollars Meals

Description

Add Additional Services to Visit ^

Print Or Add Card ^

Please print a new ID card or scan an existing card to add this household. ?

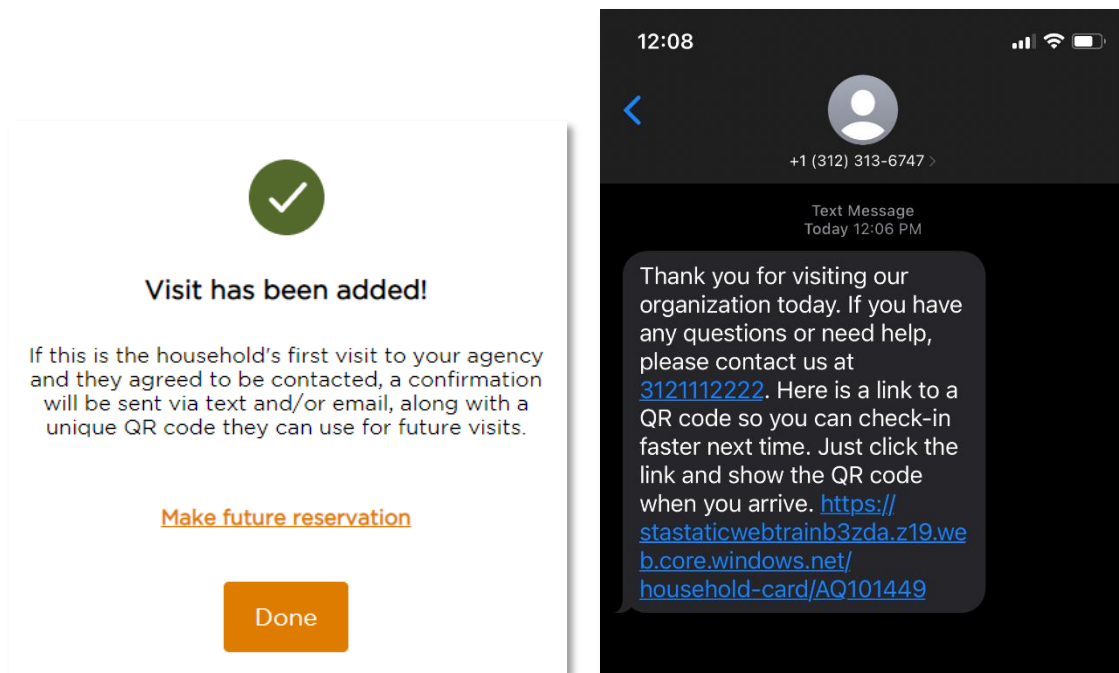
OR

 Need to resend neighbor card?

*You must fill out all required fields in order to continue. All information will be saved.

- **Primary Services Provided:** this confirms the TEFAP primary service you selected at the beginning of intake; you cannot change this selection.
 - a. Add Pounds, Pieces, Meals and/or Dollars
- **Add Additional Services to Visit:** select any additional services provided to the neighbor; this list is pre-set for each event.
 - a. Add Pounds, Pieces, Meals and/or Dollars
- **Print or Add Card:** A new or existing barcode and QR card can be used to make return visits a simple one-step process.
 - a. Choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
 - b. Choose **Enter or Scan Barcode** to link an existing card to the household's account, such as a neighbor's grocery store shopper card, library card, or other barcode card. You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device's camera or barcode scanner. You can have multiple new and existing barcodes associated with a household's account. A barcode card can be used at any agency using the system.

11. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).
12. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.



At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

ADD ANONYMOUS VISIT

The anonymous visit option allows you to create a unique visit or household record for a neighbor who does not wish to share some or any of their personal information. It is a flexible option that removes the requirement to answer any question, thus giving the neighbor the choice to share. **Note: the anonymous visit cannot be used for TEFAP services in Virginia.**

The screenshot shows the 'Add New Household' form. At the top, there is a dark blue header with the 'FEEDING AMERICA' logo, 'English' language selection, and 'FANO' user name. The main title is 'Add New Household'. Below the title, there are two progress indicators: '1 Household Info' and '2 Finish Visit'. The form is divided into two sections: 'Basic Information' and 'Gender Identity'. In the 'Basic Information' section, the 'First Name' field contains 'Anonymous', 'Middle Name (Initial)' is empty, 'Last Name' contains 'AQ101203', 'Suffix' is set to 'Select', and the 'Anonymous' checkbox is checked. There are also fields for 'Date of Birth' and 'Age' with an 'OR' between them. The 'Gender Identity' section asks 'What gender do you identify as?' with radio buttons for 'Male', 'Female', and 'Transgender'.

1. From the home screen, click the **Add New Household** button on the top right of the home screen.
2. Select a non-regulated **primary service** (i.e., not TEFAP).
3. On the **Household Info** screen, under Basic Information, click the **Anonymous** checkbox.
 - This will automatically grey-out First Name, Middle Name, Last Name, and Suffix fields. You cannot edit these fields.
 - First Name will be recorded as “Anonymous.”
 - Last Name will be recorded as the neighbor’s unique Alt. ID. **You can write down this Alt. ID and give it to the neighbor to use at future visits. This will allow you to record future visits under the same profile, thus eliminating a duplicate record in the system.**
4. All other questions are optional. The neighbor can still choose to provide their date of birth or gender identity, for example.
5. Under **Contact**, you will need to click **No fixed address** if the neighbor does not want to share their address. When selected, your agency's main address will be automatically entered in the address field.

Contact

*Address
105 Main No fixed address ?

* This is required

Apartment, Floor, etc.
Suit 101

*City Chicago *State IL *ZIP 60101

*County Cook

Email Address
 Ok to contact ?

Phone #
 Ok to contact ? No phone

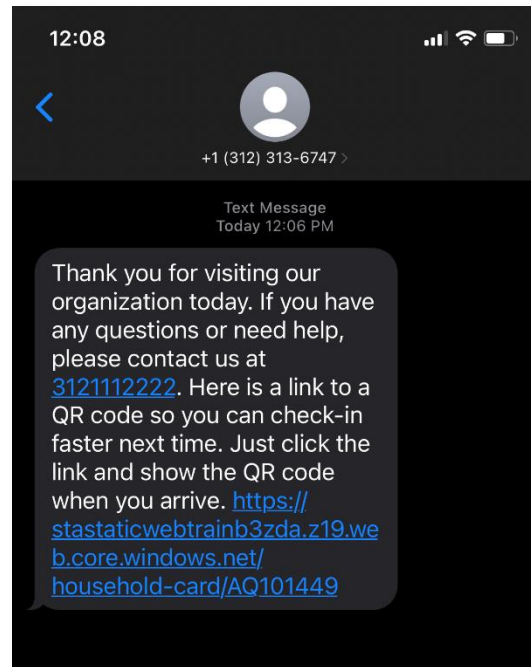
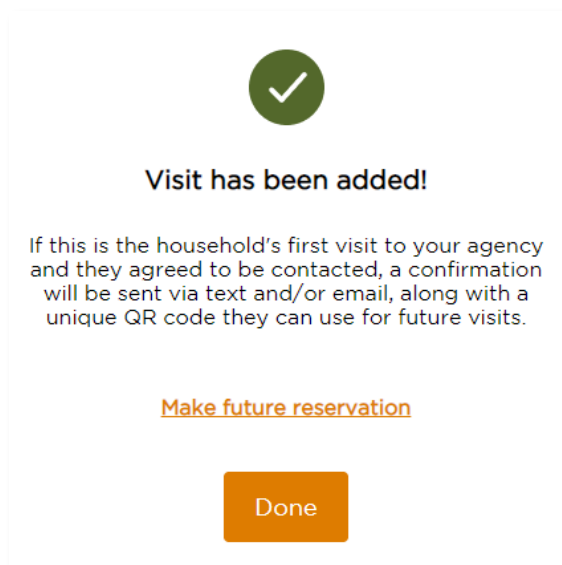
What method of communication do you prefer?

Text Call Email

6. Once you complete the **Household Info** screen, click **Save and Continue** to move on to the **Finish Visit** screen. If you choose to **Cancel**, all information entered will be lost.
7. On the **Finish Visit** screen, you will go through the same steps as a regular visit to complete the visit.
 - **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
 - **Add Additional Services to Visit:** select any additional services provided to the neighbor; this list is pre-set for each event.
 - **Print or Add Card:** You can still use the “Print or Add Card” feature with anonymous visits. In fact, it will reduce duplicates in the system if you provide a unique barcode to an anonymous neighbor that they can use in the future, while remaining anonymous.
 - a. Choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
 - b. Choose **Enter or Scan Barcode** to link an existing card to the household's account, such as a neighbor’s grocery store shopper card, library card, , or other barcode card. You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device’s camera or barcode scanner.

You can have multiple new and existing barcodes associated with a neighbor’s account. A barcode card can be used at any agency using the system.

13. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).
14. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.



ADD A RETURN VISIT

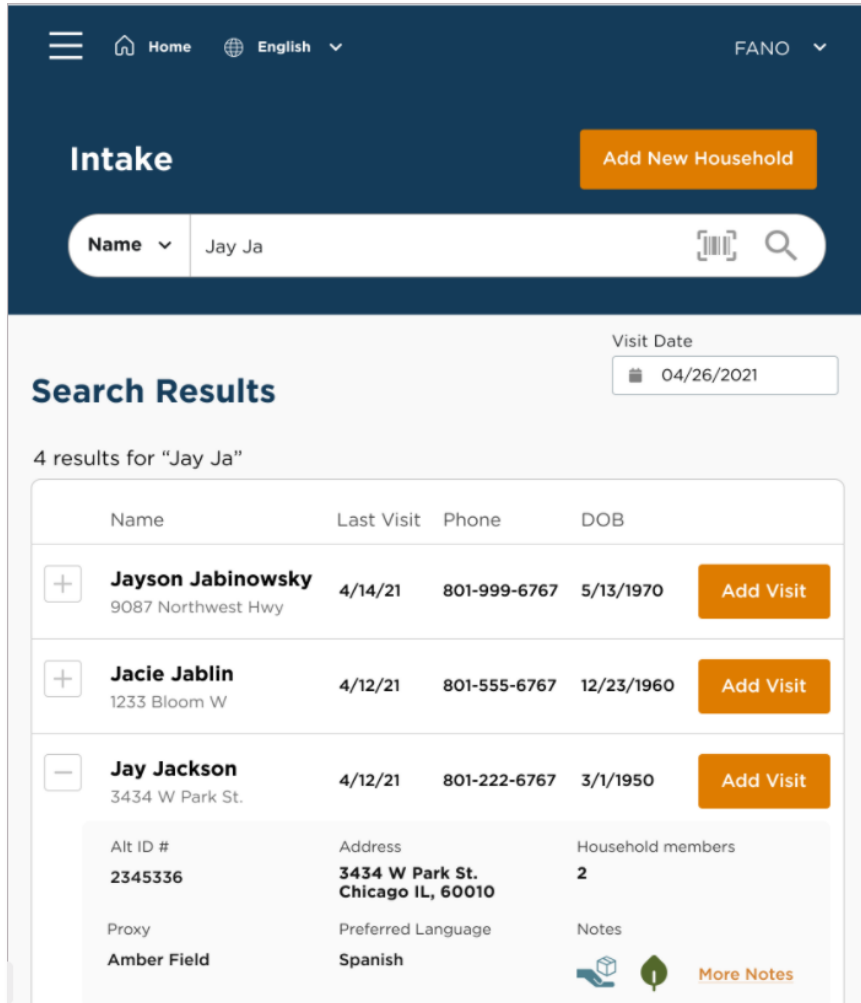
A **Return Visit** allows you to record a visit for a neighbor or household that already exists in the system. This will create a visit history for the household and is critical for reducing duplicates in the system.

1. From the home screen, begin by searching the system for a neighbor's household profile. The **search** bar is located at the top of the screen. You can search the system for a neighbor's profile by:
 - **Alt. ID:** use this for quick check-in if the returning neighbor has a barcode card of Alt. ID number. When selected, the barcode icon will appear on the right-hand side of the search bar. Click on the barcode icon to activate your device's camera or external barcode scanner. Scanning a barcode card will pull up the neighbor's household profile.

You can also type an alt. ID number directly into the search bar if the neighbor knows their Alt. ID number but doesn't have their card.



- **Address:** you can search for a neighbor's street address (e.g., *5 Test Dr.*). However, you cannot search by city, state, or ZIP code. Be sure to search using the exact spelling of the address. For example, if someone lives at *38 Peach Street* and you search for *38 Peach Road*, you may not see any results.
 - **Date of Birth:** your search must be in the format MM-DD-YYYY, MM/DD/YYYY, MM.DD.YYYY or MMDDYYYY.
 - **Name:** you can search by last name (e.g., *Doe*) or first and last name (e.g., *John Doe*).
 - **Phone #:** your search must be in the format 123-123-4444, 1231234444, or the last 4 digits (e.g., *4444*).
2. Scroll through the search results to identify the correct household record. Keep in mind that each record can be expanded using the + and - icon to the left of the name to view additional household info, such as Alt. ID #, full address, household size, proxy, preferred language, and notes.



3. Click **Add Visit** next to the household's name to start a return visit.
4. Choose the **primary service(s)** the neighbor is receiving. This will inform the intake form you complete with the neighbor. If your agency only has one primary service at an event, you will still need to select that service. Click **Next** to see the neighbor's household profile.
5. On the top of the **Household Info** screen, you will see **"Is this still your information?"** Review the neighbor's information with them. We recommend confirming that their basic information hasn't changed: address, phone number, email address, and household size/members.
 - a. If a specific household member is no longer in the household you can change that specific household members status.

- i. **Active (default):** A member of the household who will benefit from the services provided today and counts toward household size.
- ii. **Inactive:** Still a member of the household, but will not benefit from the services provided today and does not count toward household size.
- iii. **Permanently Inactive:** No longer a member of the household and does not count toward household size.
- iv. **Deceased:** Is deceased and does not count toward household size.

Household

How many people in your household, not including yourself, will benefit from the services provided today? ?

Adults (18-59 yrs.) Children (0-17 yrs.) Seniors (60+ yrs.)

Adults: 1 Children: 0 Seniors: 0

Adults

Status: Active

Middle Name (Initial) Last Name* Schoonar

Date of Birth* Age*

OR

Additional Info

SNAP Benefits

6. If any of the neighbor’s information has changed, edit their profile directly.

FEEDING AMERICA English FANO

< Back Jay Jackson Date last served: 4/12/21

1 Household Info 2 Finish Visit

Is this still your information?

Basic Information

First Name* Middle Name (Initial) Last Name*

Jay R Jackson

Suffix Select Anonymous

Date of Birth* Age*

05/06/1980 OR 40

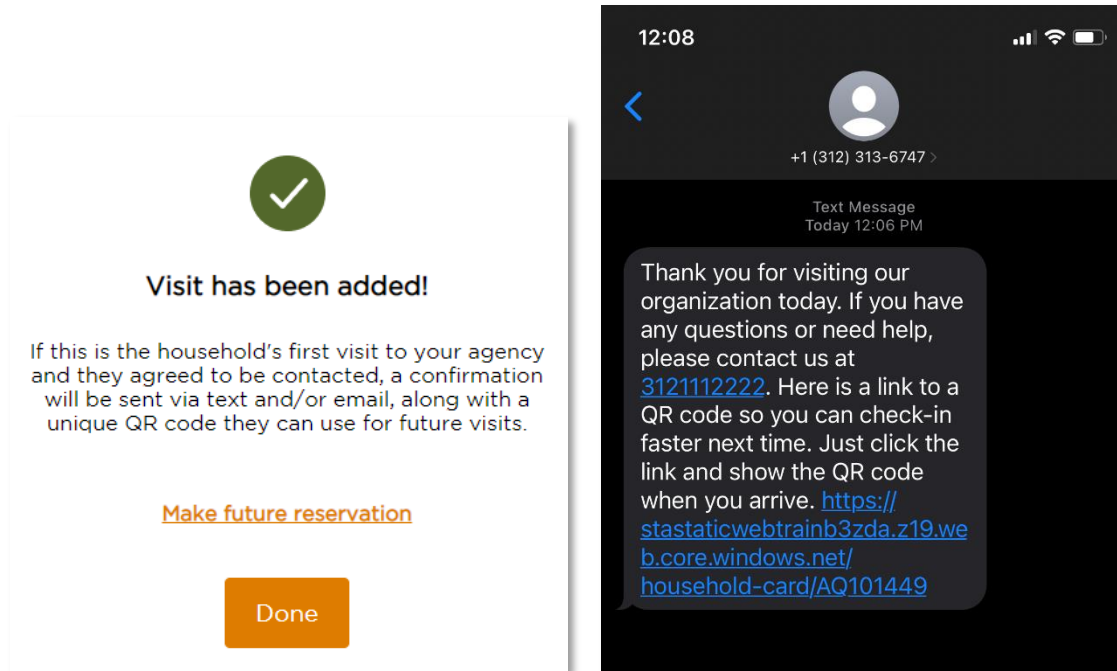
Contact

Address 1234 Bloom St. No fixed address

7. If the neighbor's profile information was previously gathered using a different intake form or at a different agency, there may be some blank questions on your intake form. Ask these questions to the neighbor now.
8. You can add a new **Note** to the neighbor's profile to document their experience, needs, preferences, follow-up items, etc. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.
9. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.
10. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.
 - **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
 - **Add Additional Services to Visit:** select any additional services provided to the neighbor; this list is pre-set for each event.
 - **Print or Add Card:** Neighbors can have multiple barcode cards associated with their account. A barcode card can be used to make return visits a simple one-step process.
 - a. **If the neighbor lost their existing barcode card or never had one**, choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
 - b. **If the neighbor would like to link an external barcode card to their account** (such as a grocery store shopper card, library card, choose **Enter or Scan Barcode**. You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device's camera or barcode scanner.

A barcode card can be used at any agency using the system.
11. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).

12. Click **Make future reservation** to be taken to reservation screen ([see Add Reservation Section](#)) or Click **Done** to return to the home screen.

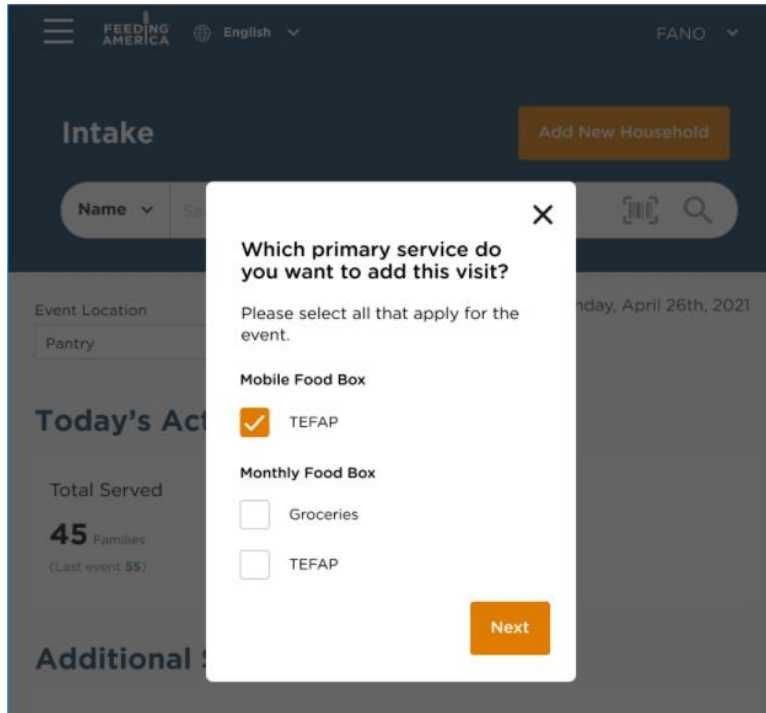


At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

ADD A RETURN VISIT (VIRGINIA TEFAP)

A **Return Visit** allows you to record a visit for a neighbor or household that already exists in the system. This will create a visit history for the household and is critical for reducing duplicates in the system.

1. To begin, follow steps 1-3 in the [Add a Return Visit](#) section.
2. Choose the **primary service(s)** the neighbor is receiving. For a TEFAP visit, the primary service must be a TEFAP service so that the TEFAP **intake form** is activated. If your program location only has one primary service at an event, you will still need to select that service. Click **Next** to begin adding the neighbor's household information.



3. On the top of the **Eligibility** screen, you will see “**Has any of your information changed?**”.
4. Review the neighbor’s information with them. **If any of the neighbor’s information has changed, it may impact their eligibility for TEFAP, so it is important to review everything.** Edit the neighbor’s profile directly if anything has changed. A record of their previous responses will be saved in the [Household Visit History](#).
 - If a specific household member is no longer in the household you can change that specific household members status.
 - i. **Active (default):** A member of the household who will benefit from the services provided today and counts toward household size.
 - ii. **Inactive:** Still a member of the household but will not benefit from the services provided today and does not count toward household size.
 - iii. **Permanently Inactive:** No longer a member of the household and does not count toward household size.
 - iv. **Deceased:** Is deceased and does not count toward household size.

Household

How many people in your household, not including yourself, will benefit from the services provided today? [?](#)

Adults (18-59 yrs.) Children (0-17 yrs.) Seniors (60+ yrs.)

1 0 0

Adults

Status

Active

Active
Inactive
Permanently Inactive
Deceased

Middle Name (Initial) Last Name*

Schooner

Date of Birth* OR Age*

[Additional Info](#) ▼

SNAP Benefits

- Once you confirm that the neighbor is eligible for TEFAP, click **Save and Continue**. If you choose to **Cancel**, all information entered will be lost.
- You will be taken to the **Signature** screen. A signature is not required upon a return visit because the client was previously determined to be eligible. Select **Save and Continue**. If you choose to **Cancel**, all information entered will be lost.

**The Emergency Food Assistance Program (TEFAP)
Certification of Eligibility To Take Food Home**

Name Phone

Eugene Krabs

Address

101 Duke St

City, State ZIP

Alexandria, VA 22314

Number of people in your household:

Members

2

No signature required today because Neighbor was previously determined to be eligible.

Eligible: Categorical Government Programs

04/26/2025 Recertification Date

- On the top of the **Household Info** screen, you will see **“Has any of your information changed?”**. Review the neighbor’s additional information with them. If anything has changed, edit their profile directly. A record of their previous responses will be saved in the [Household Visit History](#).

Home English Apple Agency Admin

< Back **Minnie Mouse**

Eligibility Signature **3 Household Info** Finish Visit

Has any of your information changed?

Race / Ethnicity

What race or ethnicity do you identify as? ?

White Hispanic, Latino, or Spanish Black or African American

Asian American Indian or Alaska Native Middle Eastern or North African

Native Hawaiian or Other Pacific Islander Some other race or ethnicity Don't Know / Prefer not to answer

8. If the neighbor's profile information was previously gathered using a different intake form or at a different agency, there may be some blank questions on your intake form. Ask these questions to the neighbor now.
9. You can add a new **Note** to the neighbor's profile to document their experience, needs, preferences, follow-up items, etc. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.
10. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.
11. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.
 - **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
 - **Add Additional Services to Visit:** select any additional services provided to the neighbor; this list is pre-set for each event.
 - **Print or Add Card:** Neighbors can have multiple barcode cards associated with their account. A barcode card can be used to make return visits a simple one-step process.
 - a. **If the neighbor lost their existing barcode card or never had one**, choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
 - b. **If the neighbor would like to link an external barcode card to their account** (such as a grocery store shopper card, library card, choose **Enter or Scan Barcode**. You can either type in the barcode ID numbers or click on the barcode icon to scan the

barcode with your device's camera (if your device supports this functionality) or barcode scanner. A barcode card can be used at any agency using the system.

13. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).
14. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.

At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

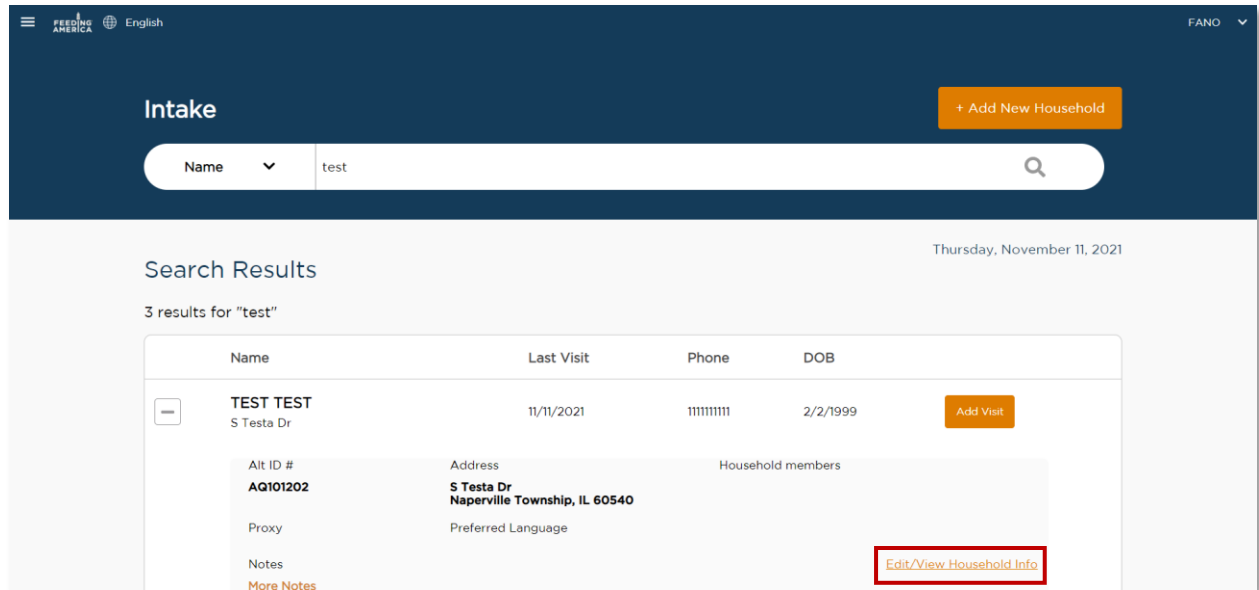
PROGRESSIVE INTAKE

In order not to overwhelm neighbors with questions, Service Insights will not display every question upon first registering a neighbor. The system will display only the most important questions first (name, address, date of birth, etc.) and will display other questions on the second visit. On a neighbor's second visit to an agency using Service Insights, they may be asked about their primary language, dietary restrictions, and food insecurity.

The Capital Area Food Bank will set up agency accounts and events so that only the "standard" questions are displayed first; however, it is possible to display every question on the first visit or to select which additional questions should be displayed. If your agency wishes to change its default intake questions to better suit client needs, please contact the Capital Area Food Bank.

EDIT/VIEW HOUSEHOLD INFO

You may need to edit or view a household's full profile outside of an event or without recording a visit. You can do so with the **Edit/View Household Info** feature.



1. From the home screen, search the system for a neighbor's household profile. The search bar is located at the top of the screen. You can search the system for a neighbor's profile by:
 - Alt. ID
 - Address
 - Date of Birth
 - Name
 - Phone #
2. Once you identify the correct household record, expand the record using the + icon to the left of the name.
3. Click **Edit/View Household Info**.

Household Profile

[Edit/View Info](#) [Visit History](#)

Basic Information

First Name* Middle Name (Initial) Last Name*

Suffix Anonymous

Date of Birth* OR Age*

Gender Identity

What gender do you identify as?*

Male Female Transgender

4. The neighbor's full household profile will be available for you to edit or view. Note that this is the neighbor's most recent profile information; to view profile information from a specific past visit, you will need to do so through [Household Visit History](#).
5. If you make any changes, you must click **Save** at the bottom of the screen. You can also **Cancel** at the bottom of the screen; any changes you make will be lost.

HOUSEHOLD VISIT HISTORY

You may need to view a household's visit history to confirm receipt of past services or to cancel an incorrect past visit record. You can do so with the **Household Visit History** feature.

Note: household visit history is only visible to users of the same agency that served the neighbor unless your food bank administrator chose to make neighbor history visible to other agencies in their network at the time of agency set-up. Thus, you may only see a neighbor's partial visit history, depending on other agencies' privacy settings.

The screenshot shows the 'Intake' system interface. At the top, there is a search bar with the text 'test' and a magnifying glass icon. Below the search bar, the page displays 'Search Results' for 'test', showing 3 results. The first result is expanded, showing details for 'TEST TEST' at 'S Testa Dr'. The expanded view includes fields for Name, Last Visit (11/11/2021), Phone (111111111), and DOB (2/2/1999). Below these are sections for Alt ID # (AQ101202), Address (S Testa Dr, Naperville Township, IL 60540), Household members, Proxy, Preferred Language, Notes, and a 'Mark as duplicate' checkbox. At the bottom, there is a 'Recent Visit History' table with columns for Date, Program Location, Services, and Status. The 'View Full History' link is highlighted with a red box.

Name	Last Visit	Phone	DOB
TEST TEST S Testa Dr	11/11/2021	111111111	2/2/1999

Date	Program Location	Services	Status
11/11/2021	Microsoft Theatre	Jewel Pre-pack	Served
10/18/2021	Microsoft Theatre	Aldi's Pre-pack	Signed

- From the home screen, search the system for a neighbor's household profile. The search bar is located at the top of the screen. You can search the system for a neighbor's profile by:
 - Alt. ID
 - Address
 - Date of Birth
 - Name
 - Phone #
- Once you identify the correct household record, expand the record using the + icon to the left of the name.
- Click **View Full History**.

The screenshot shows the 'Household' page with a 'Visit History' tab selected. The table below contains the following data:

Visitor	Date	Location	Services	Status	Signature
Jay Jackson	10/6/13	Mobile Pantry - West	TEFAP	Completed	Yes
Jay Jackson	4/21/12	Mobile Pantry - West	Groceries	Completed	No
Jay Jackson	5/27/15	Mobile Pantry - West	TEFAP	Completed	Yes
			CSFP	Completed	Yes
			Clothing	Completed	N/A
Jay Jackson	9/18/16	Mobile Pantry - West	TEFAP	Cancelled	
Jay Jackson	10/28/12	Mobile Pantry - West	Groceries	Completed	Yes

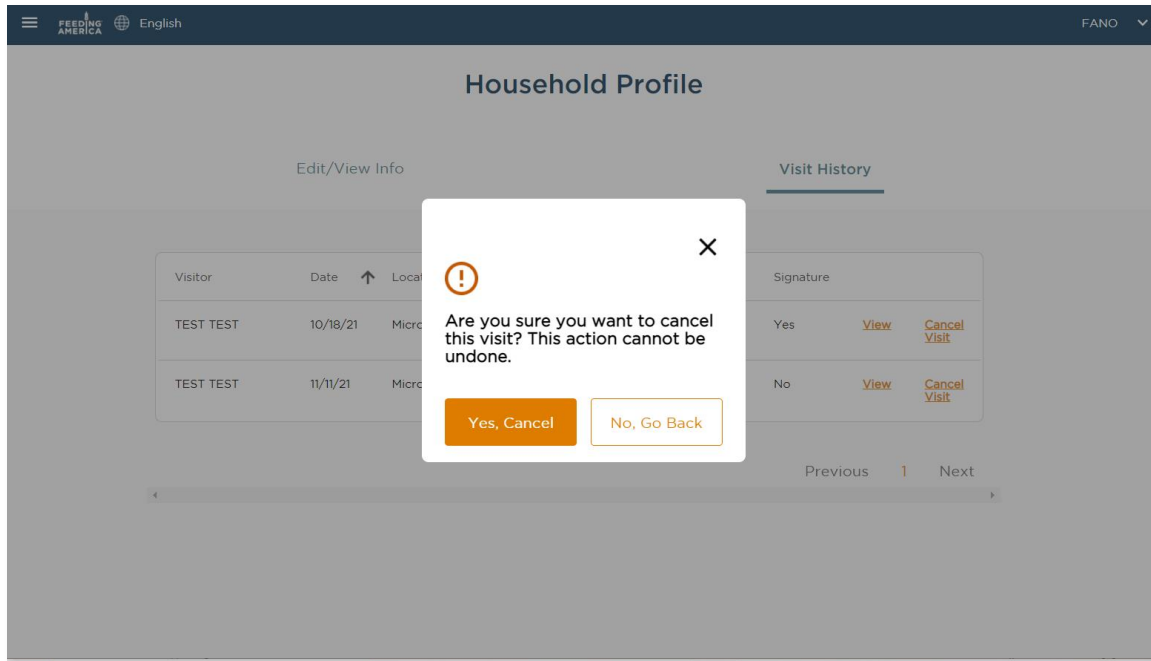
4. The neighbor’s visit history will appear, displaying the following information. Each column is sortable in alphabetical or reverse alphabetical order; click on the column title to sort by that column.

- **Visitor:** the household member who completed the visit that date.
- **Date:** the date the visit was recorded.
- **Location:** the program location where the visit was recorded.
- **Services:** the primary services received during the visit
- **Status:** whether the visit was completed or cancelled.
- **Signature:**
 - **Yes:** a signature was given for a regulated service, such as TEFAP
 - **No:** a signature is missing for a regulated service, such as TEFAP
 - **N/A:** A signature was not needed because the visit was for an unregulated service, such as groceries.

- To view a service record for a specific past visit, click **View**. This information cannot be edited. When you are finished, click **Done** at the bottom of the screen.

The screenshot shows the FEEDING AMERICA mobile app interface. At the top, there is a dark blue header with the FEEDING AMERICA logo, a globe icon, the text "English" with a dropdown arrow, and "FANO" with a dropdown arrow. Below the header, there is a white bar with a back arrow and the text "Back", the name "Jay Jackson" in large blue font, and "Visit date: 4/12/21". Below this, there is a location label "Location: Mobile Pantry - West". The main content area is a light gray box with the title "TEFAP Signature". It contains several input fields: "Name" (Jay Jackson), "Phone #" (223-655-4545), "Address" (1233 W Bloom St.), "City, State" (Chicago, IL), and "ZIP" (60610). Below these fields, there is a section titled "Number of people in your household:" with three sub-sections: "Adults (18 -59 yrs.)" (2), "Children (0 - 17 yrs.)" (2), and "Seniors (60+)" (0).

- You can also cancel a past visit. From the full Visit History page, click **Cancel Visit** next to the specific visit you wish to cancel. A warning will pop up asking you to confirm that you wish to cancel the visit. *This cannot be undone.*

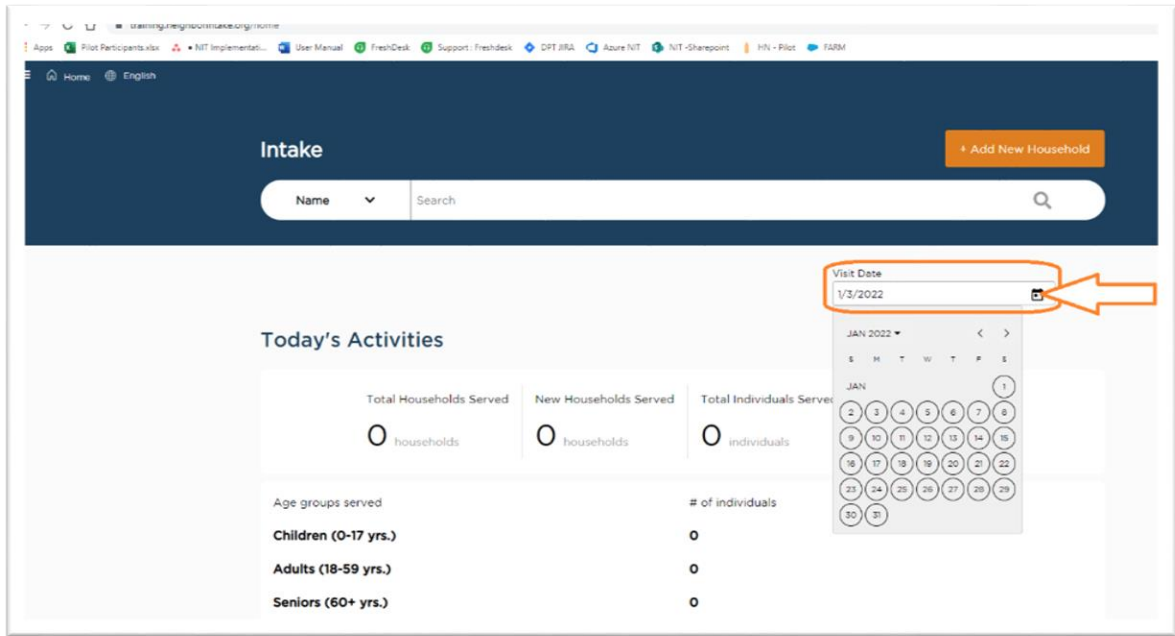


7. When you are finished viewing a household's visit history, click the **home button** on the top left to return to the Home Screen.

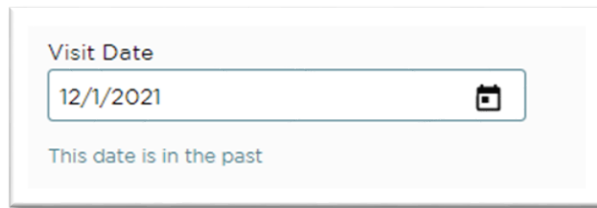
ADD A BACK-DATED VISIT

You may need to add a household visit after it occurs. For example, if you collected some paper intake forms during an event and waited until the next day to log them into the system. This visit can be for a new or returning neighbor. This visit can also be for a TEFAP service or any other service. **Be sure to add the correct visit date, event, and service type(s) as this is critical for reporting and your audit.**

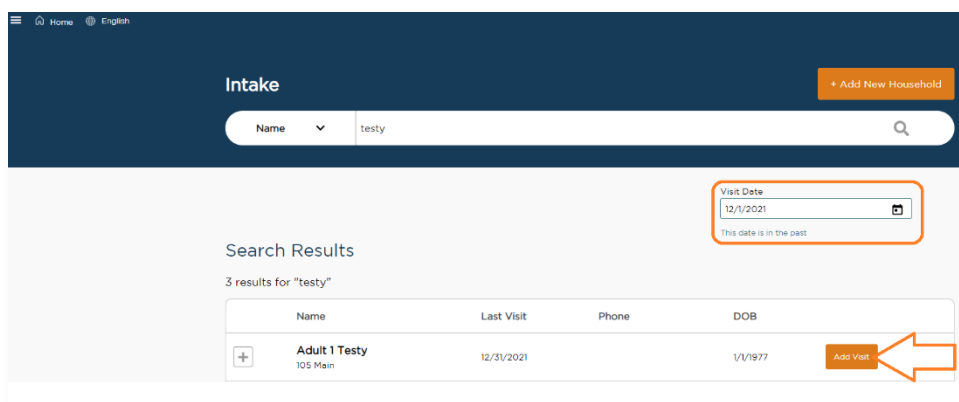
1. If the past Event has not yet been created, you will need to do that first.
2. From the home page, **change the "Visit Date"** on the calendar to the date of the past event.



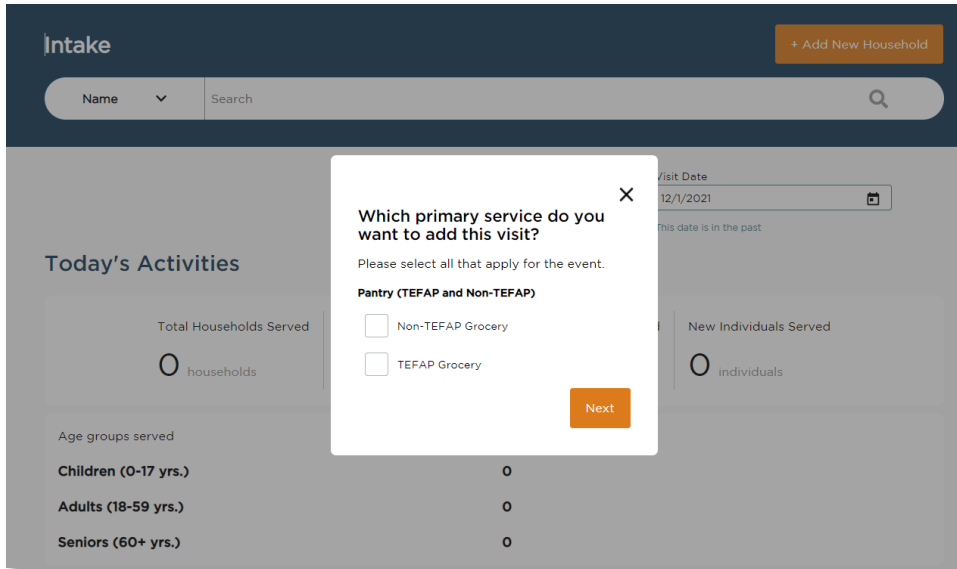
Once the date has been changed you will see a notification that “This date is in the past.”



3. Search for or add your new neighbor (see “Add New Household” or “Add Return Visit” sections for more details.)



4. Select your primary service(s) (if a service is not available to you, check your Event configurations to make sure the event was set up for the visit date you have selected.)



5. Add the Visit. (see “Add New Household” or “Add Return Visit” sections for more details.) If it is a TEFAP visit, select “Typed Name” as the Signature Type and type “Signed on Paper” in the Typed Name box. Retain your paper form, as this is required for your TEFAP audit.

TEFAP Signature

Name: Testing Testy Phone: 123-456-7890

Address: 105 Main, Suit 101

City, State: Chicago, IL ZIP: 60101

Number of people in your household:

Adults (18-59 yrs.): 1 Children (0-17 yrs.): 0 Seniors (60+ yrs.): 2

Family Size	Annual	Monthly	Weekly	Bi-weekly
3	\$15	\$12	\$3	\$9

I certify that I have willingly shared the information above, meet the monthly income guidelines, and/or am in need of food assistance.

Signee*: Testing Testy Date: 12/31/2021

Signature Type*: Typed Name
 Typed Name*: Signed On Paper

USDA Nondiscrimination Statement
 In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity conducted or funded by the USDA.

In your compliance report, the captured TEFAP signature will display as “Signed on Paper.” This will alert you and your regulator that the paper copy of the form is the official copy.

6. When you have finished adding any past visits, be sure to change the date back to today on the calendar.

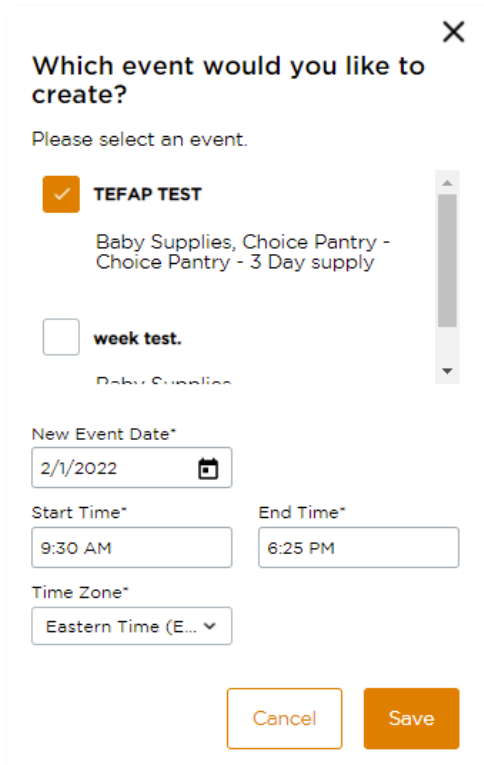
AD HOC EVENT CREATION

If an event does not already exist on a day you are trying to serve neighbors, you may need to quickly create a new, ad hoc event. This should only be used in unpredicted circumstances and should not replace normal event creation through the Admin Settings section.

1. From the home page, scroll down to the “Events Today” section and click on the link that says **Don't see the event you need? + Add New**

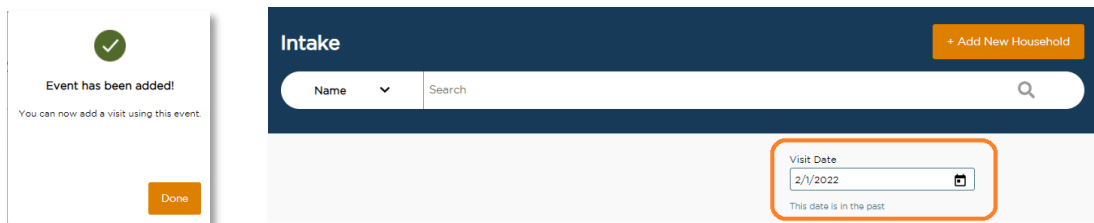
2. From the pop-up window choose a **template event** (these are events that were previously created through the Admin Settings section), a new **date** (this will likely be today's date but could also be a date in the past if you're adding a back-dated visit), **start**

time, end time and time zone. Note that you will be able to add services at any time during the day of an event, regardless of whether it occurs between the start and end times. Click the **Save** button.



The screenshot shows a modal dialog box titled "Which event would you like to create?". It contains a list of events with checkboxes. The first event, "TEFAP TEST", is selected and includes the description "Baby Supplies, Choice Pantry - Choice Pantry - 3 Day supply". Below the list, there are input fields for "New Event Date*" (2/1/2022), "Start Time*" (9:30 AM), "End Time*" (6:25 PM), and "Time Zone*" (Eastern Time (E...)). At the bottom, there are "Cancel" and "Save" buttons.

- When your ad hoc event has been successfully created, you will receive a confirmation message. The home page will refresh, and you should now see your new event in the Events Today section. **Note: if you created a back-dated event, the page will refresh and reset the visit date to the past date.**



- If the same event already exists on the selected date, you will get an error message and be asked to choose a different event and/or date.

Which event would you like to create?

Please select an event.

TEFAP TEST
Baby Supplies, Choice Pantry - Choice Pantry - 3 Day supply

week test.
Baby Supplies

New Event Date*
2/1/2022

Start Time*
9:30 AM

End Time*
6:25 PM

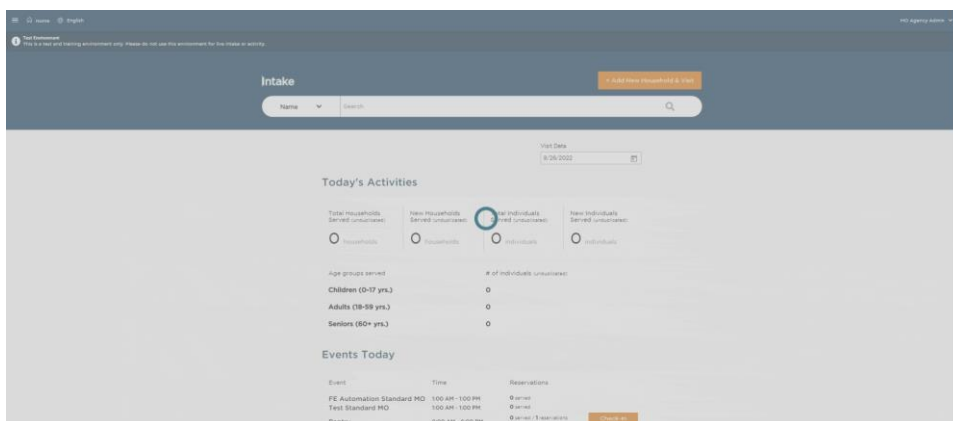
Time Zone*
Eastern Time (E...)

***An instance of this event is already active for the selected date! Please try a different event/date combination.**

RESERVATIONS

A reservation is a future-dated service visit that you schedule in advance. It is a placeholder to indicate a neighbor will be served at a specific event. An agency must first be configured to accept reservations.

1. To manage your reservations, **click on the Menu** on the top left of the home screen and select **“Reservations”**.



ALL EVENTS WITH RESERVATIONS

This page will give you the ability to have a glance at all Events with the ability to take reservations. This ability was created during the Event set-up process. This table includes the date, time, event, services offered, total number of reservations made so far, max capacity of the event, and a Reserve Button.

Date	Time	↑ Event	Services	Total Reservations	Capacity	
9/20/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/21/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/22/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/23/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/24/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve

Tips for using this table

- You can alphabetically sort columns in this table by hovering over and clicking the column title. An up or down arrow will appear to the right of the column that is sorted.
- You can use the date range field to search for Events within a specific date range.
- This list can be exported by clicking the **Export to excel** link.

Event Name

If you would like to look at the event details for a specific date, click on the event name. This will open a list of that day's reservations for that event.

Reserve Button

If you would like to make a reservation for a neighbor to a specific event, click the reserve button next to the event. This will take you to a screen that will allow you to search for a specific neighbor. If the neighbor is not in the system, you can also add a new household and make them a reservation.

CHECK-IN LIST

The check-in list will serve as the primary way to review the upcoming reservations for an event. From here you can review the details of the events, manage reservations, and serve neighbors who have made reservations.

The screenshot displays the 'Mobile Distribution Reservations' interface. At the top, a summary table shows: Total Capacity (100), Total Reservations (3), Remaining Capacity (97), and Total Served (0). Below this are tabs for 'Event Reservations' and 'Neighbor Search'. A 'Visit Date' selector is set to 9/22/2022, with an 'Export to excel' link and a '+ Add New Household & Reservation' button. A search bar is present above a table of reservations. The table has columns for Date, Time, Name, Services, and Status. Three reservations are listed for 9/22/2022: Captain Crunch (3:15 PM CST), Tony The Tiger (2:14 PM CST), and Count Chocula (4:16 PM CST), all for Mobile Pantry services. Each row includes 'Edit' and 'Cancel' links and a 'Check-In' button. At the bottom, there are 'Previous', '1', and 'Next' navigation options.

Total Capacity	Total Reservations	Remaining Capacity	Total Served
100	3	97	0

Event Reservations | Neighbor Search

Visit Date: 9/22/2022 | [Export to excel](#) | [+ Add New Household & Reservation](#)

Date	Time	Name	Services	Status
9/22/2022	3:15: PM (CST)	Captain Crunch	Mobile Pantry	Edit Cancel Check-In
9/22/2022	2:14: PM (CST)	Tony The Tiger	Mobile Pantry	Edit Cancel Check-In
9/22/2022	4:16: PM (CST)	Count Chocula	Mobile Pantry	Edit Cancel Check-In

Previous 1 Next

Capacity

This table at the top of the page shows the capacity for the event you've selected (if the event is recurring, the capacity is for the specific date you selected).

- Total Capacity – This is the max number of reservations accepted at this event
- Total Reservations – The current number of reservations made
- Remaining Capacity – The number of reservation spots still available
- Total Served – The number of reservations that have been served

Event Reservations

Click on the “Event Reservations” tab below Capacity to view a list of reservations for the event you’ve selected (if the event is recurring, the list is for the specific date you selected). You can export this list to excel. You can also add a new household and reservation. Using the search bar on this screen will search for a neighbor already on the list.

- Click on the neighbor's name to be taken to that neighbor’s edit/view profile.
- Click “Edit” to edit the reservation.
- Click “Cancel” to cancel the reservation.
- Click “Check-In” on the date of the event to serve the neighbor. This will route you into the returning neighbor intake flow.

Neighbor Search

Click on the “Neighbor Search” tab below Capacity to view a screen that will allow you to search for a specific neighbor to add a reservation for that neighbor. If the neighbor is not in the system, you can also add a new household and make their reservation.

The screenshot displays the 'Mobile Distribution Reservations' interface. At the top, there are four summary cards: 'Total Capacity' (100), 'Total Reservations' (3), 'Remaining Capacity' (97), and 'Total Served' (0). Below these cards are two tabs: 'Event Reservations' and 'Neighbor Search', with the latter being the active tab. Under the 'Neighbor Search' tab, there is a 'Search Results' section with the prompt 'Please enter a search term.' and an orange button labeled '+ Add New Household & Reservation'. At the bottom, there is a search input field with a dropdown menu set to 'Name' and a search icon.

Total Capacity	Total Reservations	Remaining Capacity	Total Served
100	3	97	0

Event Reservations **Neighbor Search**

Search Results

Please enter a search term.

[+ Add New Household & Reservation](#)

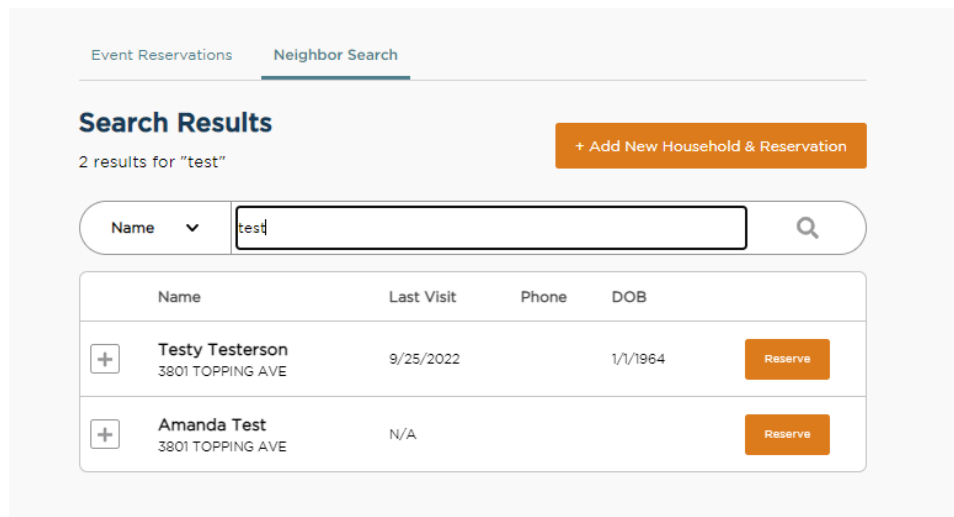
Name ▾ Search 🔍

ADD NEW RESERVATION

Search

This search box works the same as the search box on the home screen ([See Search Section](#)). This search will show neighbors who are already in the system.

1. **Search** for a neighbor
2. Click the **“Reserve”** button

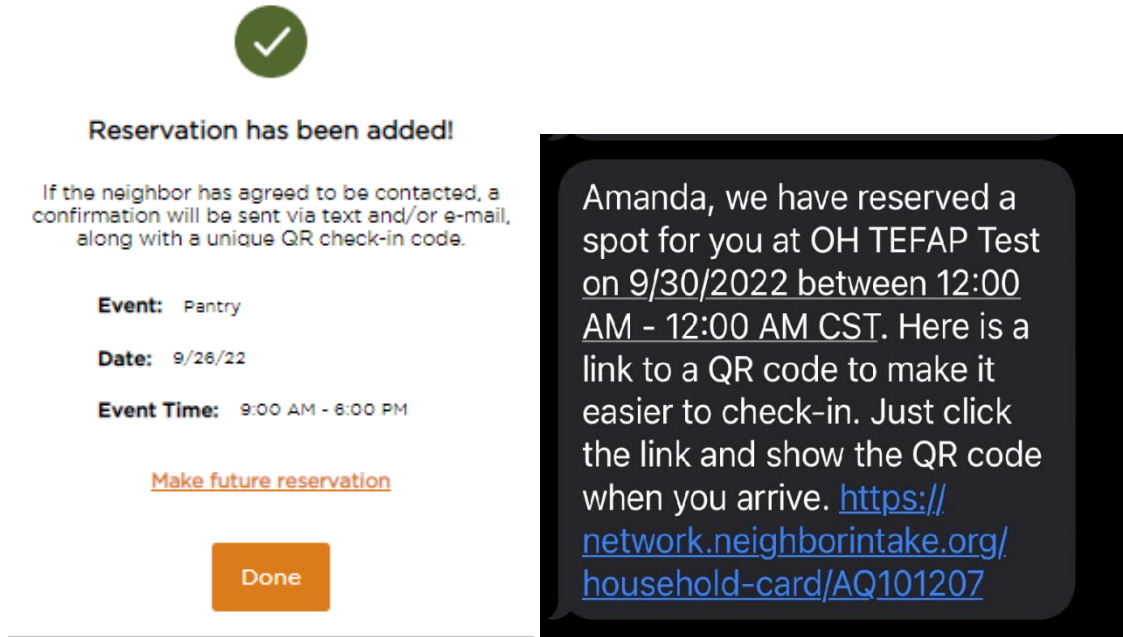


The screenshot displays the 'Neighbor Search' section of a web application. At the top, there are two tabs: 'Event Reservations' and 'Neighbor Search', with the latter being active. Below the tabs, the heading 'Search Results' is followed by the text '2 results for "test"'. To the right of this text is an orange button labeled '+ Add New Household & Reservation'. Below the heading is a search input field with a dropdown menu set to 'Name' and a search icon. The search results are presented in a table with columns for Name, Last Visit, Phone, and DOB. Each row includes a plus icon in a square, the neighbor's name and address, their last visit date, their phone number, their date of birth, and an orange 'Reserve' button.

	Name	Last Visit	Phone	DOB	
+	Testy Testerson 3801 TOPPING AVE	9/25/2022		1/1/1964	Reserve
+	Amanda Test 3801 TOPPING AVE	N/A			Reserve

3. Select **Primary Service** and click **Next**.
4. A pop-up will appear confirming that the reservation has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up

text/email. A text/email will be sent to neighbor each time a reservation is made.

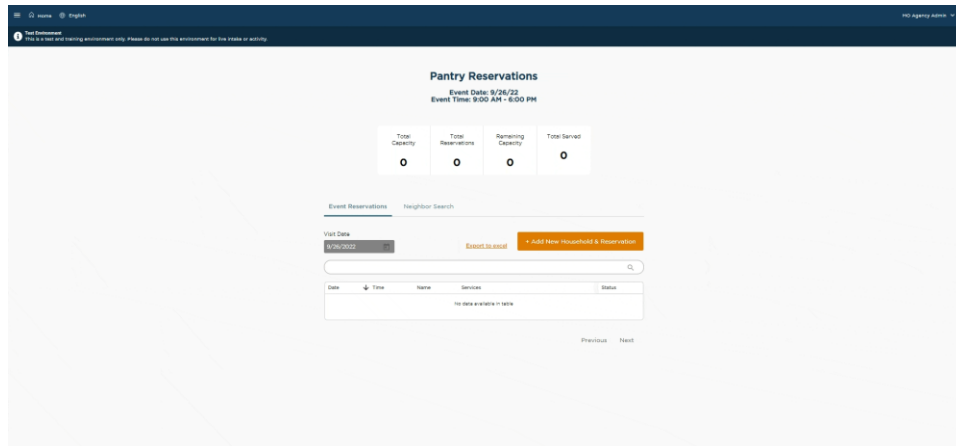


The image shows a confirmation screen on the left and a text message on the right. The confirmation screen features a green checkmark icon at the top, followed by the heading "Reservation has been added!". Below this, a message states: "If the neighbor has agreed to be contacted, a confirmation will be sent via text and/or e-mail, along with a unique QR check-in code." The event details are listed as: "Event: Pantry", "Date: 9/26/22", and "Event Time: 9:00 AM - 6:00 PM". There is a link for "Make future reservation" and a prominent orange "Done" button at the bottom. The text message on the right is from Amanda, stating: "Amanda, we have reserved a spot for you at OH TEFAP Test on 9/30/2022 between 12:00 AM - 12:00 AM CST. Here is a link to a QR code to make it easier to check-in. Just click the link and show the QR code when you arrive. <https://network.neighborintake.org/household-card/AQ101207>"

Add a New Household & Reservation

If a neighbor is not in the system, you can add them and make a reservation at the same time. Always search for a neighbor before creating a new one to prevent duplicates in the system.

1. Click the Add New Household & Reservation button
2. Select Primary Service and click Next



3. Reservations will only have one page of questions about the neighbor. It will have the same required questions if you were serving a neighbor today, however you will not finish the visit. To view more information about the required questions see [Add a New](#)

[Household](#) or [Add a New Household \(TEFAP\)](#).

Add New Household

1 Household Info

Basic Information

*First Name * This is required

Middle Name (Initial)

*Last Name * This is required

Suffix Anonymous

Contact

*Address * This is required No fixed address ?

Apartment, Floor, etc.

*City * This is required

*State * This is required

*ZIP * This is required

*County * This is required

- Click **Finish** to make the reservation and save all information. A pop-up will appear confirming that the reservation has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. **A text/email will be sent to neighbor each time a reservation is made.**



Reservation has been added!

If the neighbor has agreed to be contacted, a confirmation will be sent via text and/or e-mail, along with a unique QR check-in code.

Event: Pantry

Date: 9/26/22

Event Time: 9:00 AM - 6:00 PM

[Make future reservation](#)

Done

Amanda, we have reserved a spot for you at OH TEFAP Test on 9/30/2022 between 12:00 AM - 12:00 AM CST. Here is a link to a QR code to make it easier to check-in. Just click the link and show the QR code when you arrive. <https://network.neighborintake.org/household-card/AQ101207>

SERVE A RESERVATION

A reservation can be served two ways. **The first is to use the Check-In List.** This is ideal for large distributions in which all neighbors will have a reservation. **The second is to use the search from the home page.** This is ideal for distributions in which some, but not all, neighbors will have a reservation.

1. From the **Check-In List**. The check-in list will display the reservations that are ready to be completed. The Button will change from "Reserve" to "Check-In". **Click the "Check-In" button to be routed through the returning neighbor flow.** (See [Add a Return Visit](#) and [Add a Return Visit \(TEFAP\)](#).)

Pantry Reservations

Event Date: 9/26/22
Event Time: 9:00 AM - 6:00 PM

Total Capacity	Total Reservations	Remaining Capacity	Total Served
0	1	0	0

Event Reservations | Neighbor Search

Visit Date: 9/26/2022 [Export to excel](#) [+ Add New Household & Reservation](#)

Date	Time	Name	Services	Status
9/26/2022		Amanda Test	MO TEFAP Food Pantry Edit Cancel	Check-In

Previous 1 Next

- From the home screen search for a neighbor. If the neighbor has a reservation a “Check-In” Button will display. Click the “Check-In” Button to be routed through the returning neighbor flow. You may also see an “Add Visit” button if there are multiple events for today. (See [Add a Return Visit](#) and [Add a Return Visit \(TEFAP\)](#).)

Intake

[+ Add New Household & Visit](#)

Name ▼

Visit Date: 9/26/2022

Search Results

2 results for "test"

	Name	Last Visit	Phone	DOB	
+	Testy Testerson 3801 TOPPING AVE	9/25/2022		1/1/1964	Add Visit
+	Amanda Test 3801 TOPPING AVE	N/A			Add Visit Check-in

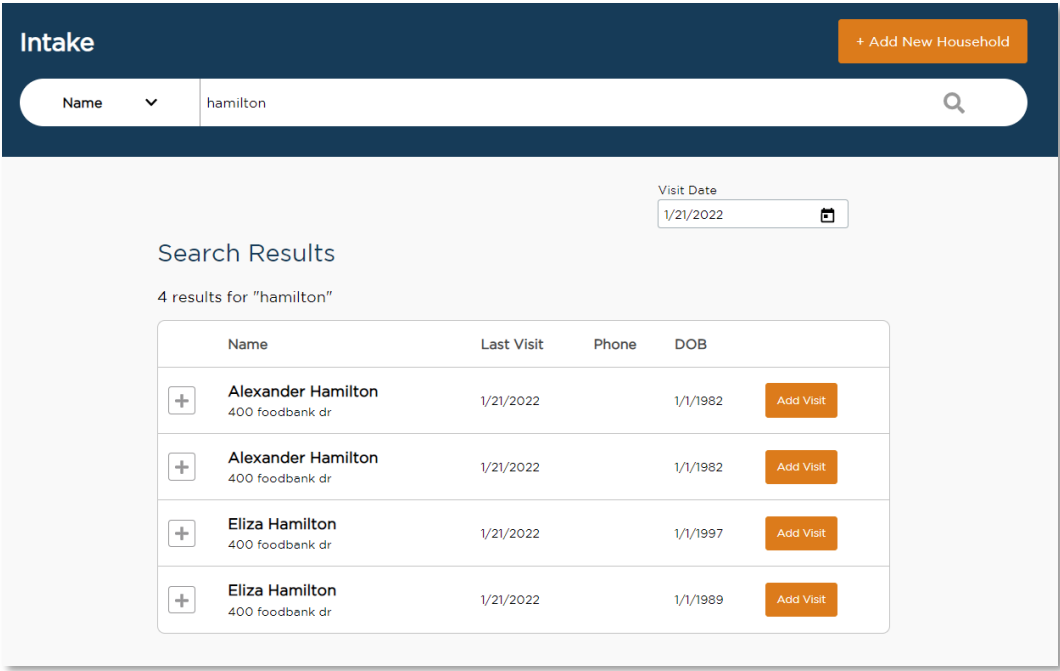
DUPLICATE MANAGEMENT

At times it will be necessary to identify and merge two duplicated households. The system will attempt to identify duplicates every five minutes. Any households with a match rating of 30% or higher will be placed in a queue to be managed. The system is not perfect and will likely not identify 100% of true duplicates. Therefore, it is critical that food bank and agency administrators and staff are trained to monitor for duplicates regularly.

IDENTIFY A DUPLICATED HOUSEHOLD DURING INTAKE

During the intake process, it is possible that you may come across a household that is an obvious duplicate of another household. You can help identify these households as potential duplicates and add them to the queue to be resolved.


1. Search for a household



2. Click the + to expand the family information

Search Results

4 results for "Hamilton"

Name	Last Visit	Phone	DOB
 Alexander Hamilton 400 foodbank dr	N/A		1/1/1964

↑
→

Alt ID # AQ103541	Address 400 foodbank dr Columbus, OH 43123	Household members Eliza Hamilton Phillip Hamilton
Proxy	Preferred Language	
Notes More Notes	Edit/View Household Info	
<input checked="" type="checkbox"/> Mark as duplicate		
Recent Visit History		View Full History

3. Click the box to "Mark as duplicate."
4. The household will be placed in the duplicate queue for review by a user with permission to manage duplicates. Refer to the [User](#) section to review these permissions. **Note: the flagged household will still appear in Search and the "Mark as duplicate" check box will still be available to check until the potential duplicate household has been reviewed by admin.**

APPENDIX

VERSION RELEASES & BUG FIXES

We employ an agile method of updating the software. Feeding America makes regular small fixes and improvements, in addition to larger feature releases.

COMPATIBLE DEVICES AND BROWSERS

Desktop / Laptop

- Mac
 - Google Chrome (up to date version)
 - Mozilla Firefox (up to date version)
 - Safari (up to date version)
- Windows

- Google Chrome (up to date version)
- Mozilla Firefox (up to date version)
- *Device example: Samsung, Lenovo, or HP Chromebook*

Tablet

- iOS 10.3.4 or higher
 - Safari (up to date version)
 - Google Chrome (up to date version)
 - *Device example: iPad*
- Android 10 or higher
 - Google Chrome (up to date version)
 - *Device example: Samsung Galaxy Tab S7 Plus*
- Fire OS 7 or higher
 - Silk Browser (up to date version)
 - *Device example: Amazon Fire HD 8*

Mobile

- iOS 10.3.4 or higher
 - Safari (up to date)
 - Google Chrome (up to date version)
 - *Device example: iPhone*
- Android 10 or higher
 - Google Chrome (up to date version)
 - *Device example: Samsung Galaxy S21*

Other Devices

- Barcode scanner
 - There are many peripheral barcode scanners that will connect to a desktop or laptop computer. Wired barcode scanners are not typically compatible with tablets or mobile devices, but the camera in those devices will work as a barcode scanner in this platform.
 - *Device example: Fully Upgraded Wireless 2D QR Barcode Scanner with Stand, 3 in 1 Bluetooth & 2.4GHz Wireless & USB Wired Connection, Connect Smart Phone Tablet PC, Image Bar Code Reader with Vibration Alert by Tera (available on Amazon)*

MOBILE DISPLAY

The Service Insights on MealConnect platform is fully mobile responsive. Every screen is optimized to function on devices of different sizes – laptops, tablets, and mobile phones. For example, mobile phone displays include:

FEEDING AMERICA FANO

Intake + Add New Person

All Search

Monday, April 26th, 2021

Today's Activity

Total Served	New Families Served
45 Families (Last event 55)	5 Families (Last event 11)

Additional Assistance

FEEDING AMERICA FANO

< **Add New Household**

1 2 3

Basic Information

First Name*

Middle Name

Last Name*

Suffix

Anonymous

Date of Birth OR Age*

FEEDING AMERICA FANO

Intake + Add New Person

All Search

Monday, April 26th, 2021

Search Results

4 results for "Jay Ja"

Name	
+ Jayson Jabinowsky 9087 Northwest Hwy	+ Add Visit
+ Jacie Jablin 1233 Bloom W	+ Add Visit