

# Service Insights on MealConnect User Manual – Agency Users

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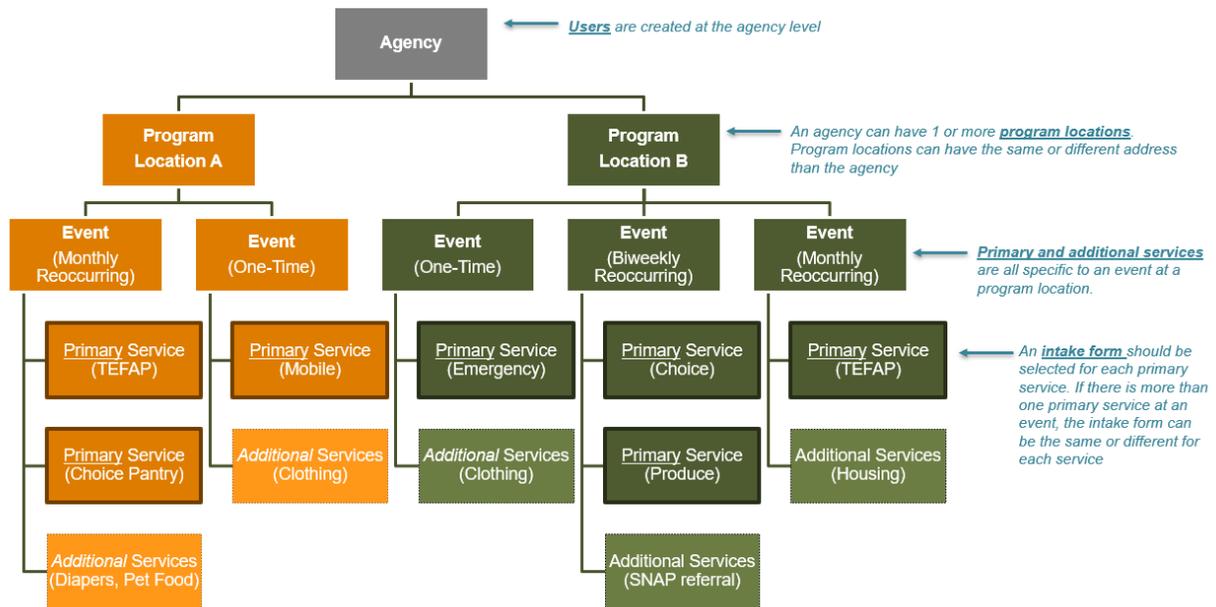


# GETTING STARTED

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

## ORGANIZATIONAL STRUCTURE

Service Insights is organized in the following way: Each food bank has 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.

**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, the developers of Service Insights, 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. While the program location is often the same as an agency location, some agencies may have multiple program locations if they operate multiple sites.

**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.

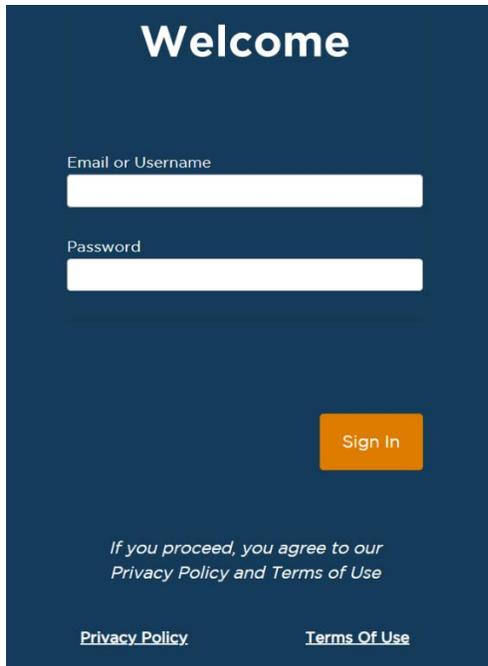
**Additional service:** Any additional resources or assistance provided to households at a program location during an event. These are often non-regulated or non-food related services that are supplemental to the primary service being offered.

**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.

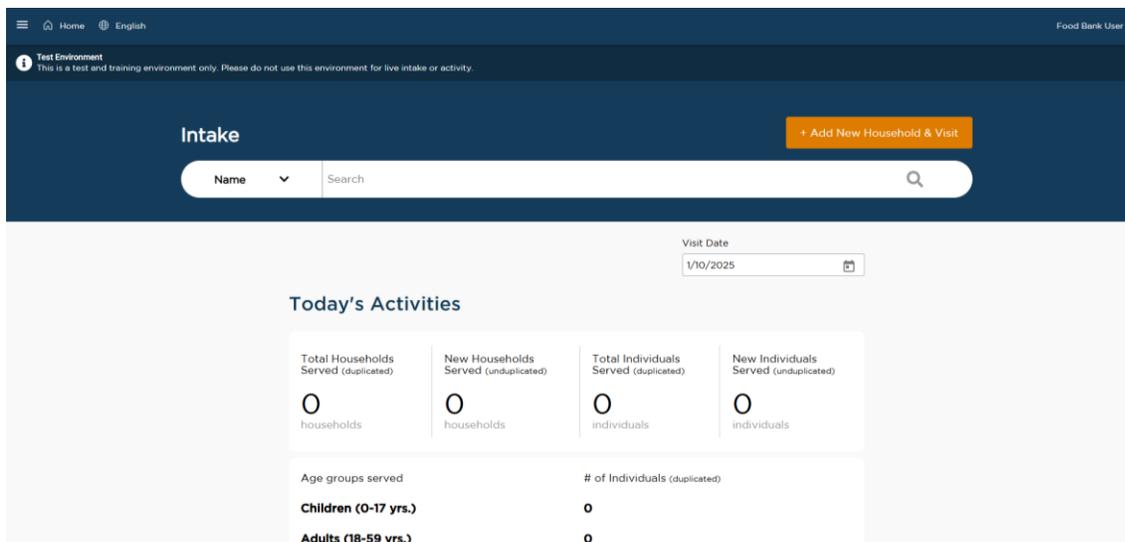
## LOGGING IN

To log in to the training site, go to [training.neighborintake.org](https://training.neighborintake.org). To log into the live site, go to [network.neighborintake.org](https://network.neighborintake.org). Enter your **Email** address or **Username** and **Password** assigned by the team at the Capital Area Food Bank. 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.

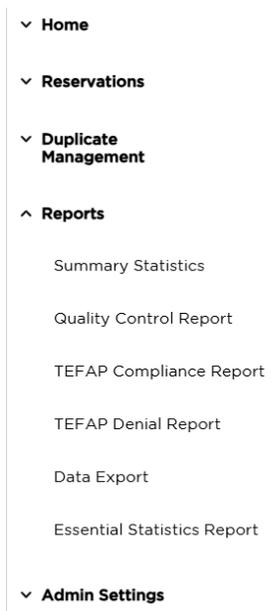


The home screen displays:

- **Today's Activity** 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. Selecting the number of people served will allow you to view each household served.
- **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.

The home screen also contains the **Search** bar, **Add A New Household & Visit** 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”.

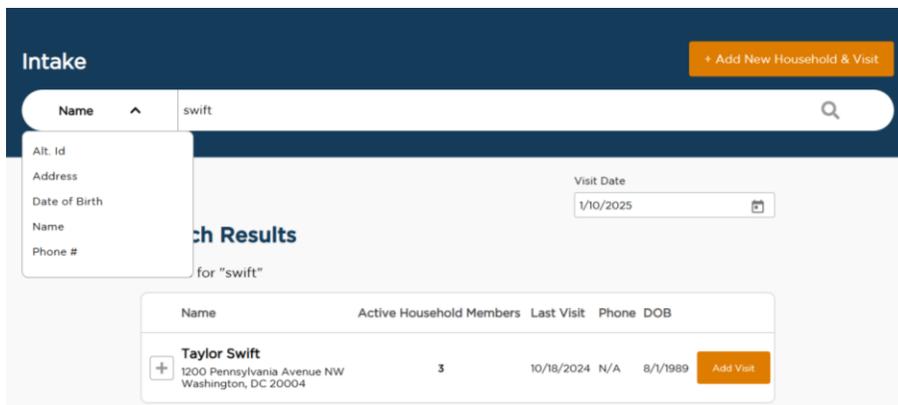
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# INTAKE

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

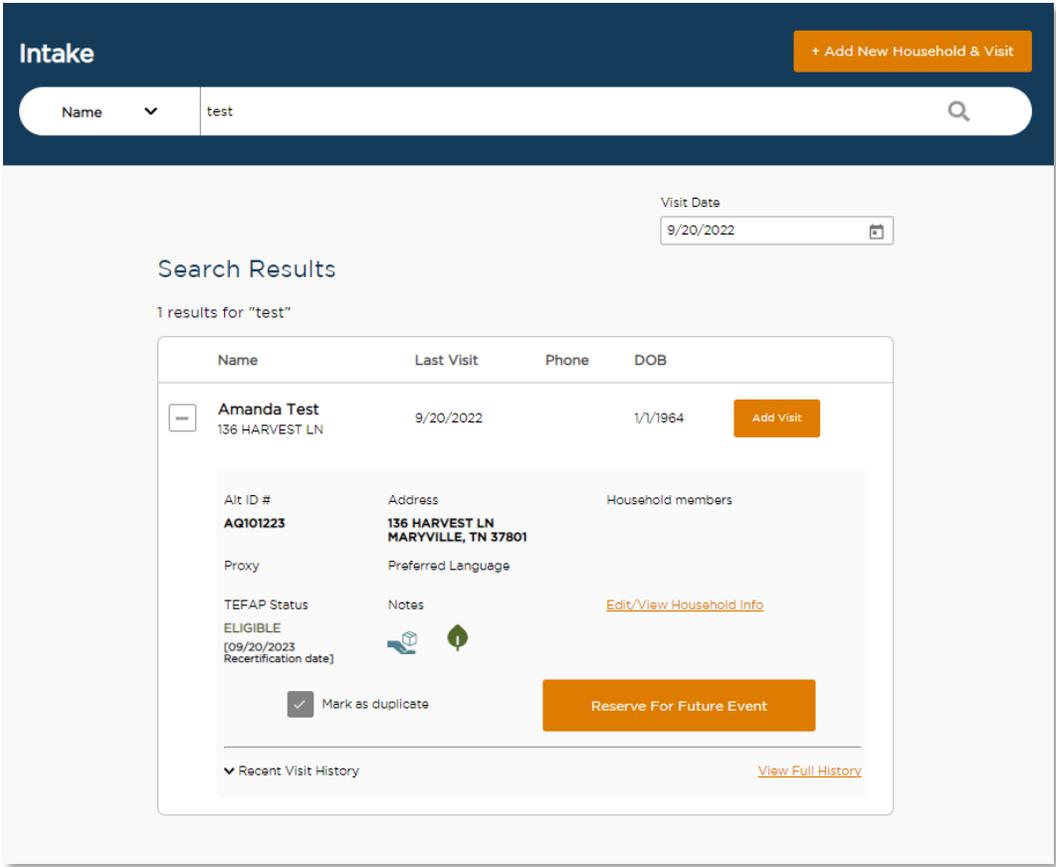
The Search function allows you to identify whether a neighbor already exists in the system before you begin intake.



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. When selected, the barcode icon will appear on the right-hand side of the search bar. Scanning a barcode card will pull up the neighbor's household profile. You can also type a barcode number directly into the search bar. If you are on a mobile device such as a phone or tablet, you can also use your device camera to scan a barcode by selecting the barcode icon on the right.



- **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 will 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*), last, first name (e.g., *Doe, John*), or last name, first initial (e.g., *J Doe*).
  - **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 number, date of birth, household members' names, and last visit date, amongst other things. Children will not appear in the search results.
  3. From the search results, you can also:
    - Add a Return Visit
    - Add a Reservation
    - Edit/View Household Info
    - View 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 & Visit** 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 nearby agency.**



2. For non-TEFAP agencies, there are two steps to adding a new household:
  1. Household Info
  2. Finish Visit

**Add New Household**

Visit Date: 1/10/2025

Household Info Finish Visit

**Basic Information**

\*First Name  Middle Name (Initial)  \*Last Name   
\* This is required \* This is required

Suffix   Anonymous

\*Date of Birth  OR \*Age   
\* This is required \* This is required

3. On the **Household Info** screen, you will ask the neighbor for their basic information and any additional questions. The full list of questions is below (asterisks denote required questions), but the list you see under Household Info will be pre-determined by the Capital Area Food Bank or 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.

Date of Birth  OR Age   
\* 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  
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

- **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 some cities are independent and are not part of a county). You may leave this field blank.
- **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\*:** select one.
- **Race or Ethnicity\*:** select as many that apply. You can select a nationality as well by using the drop-down menu.
- **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 type over these.

- **Date of Birth or Age\***
- **Gender Identity** (under Additional Info)
- **Race or Ethnicity** (under Additional Info)

**Adults** Remove #

\*Status: Active

\*First Name: Adult 1

Middle Name (Initial):

\*Last Name:

Suffix: Select

\*Date of Birth: OR \*Age:

Additional Info

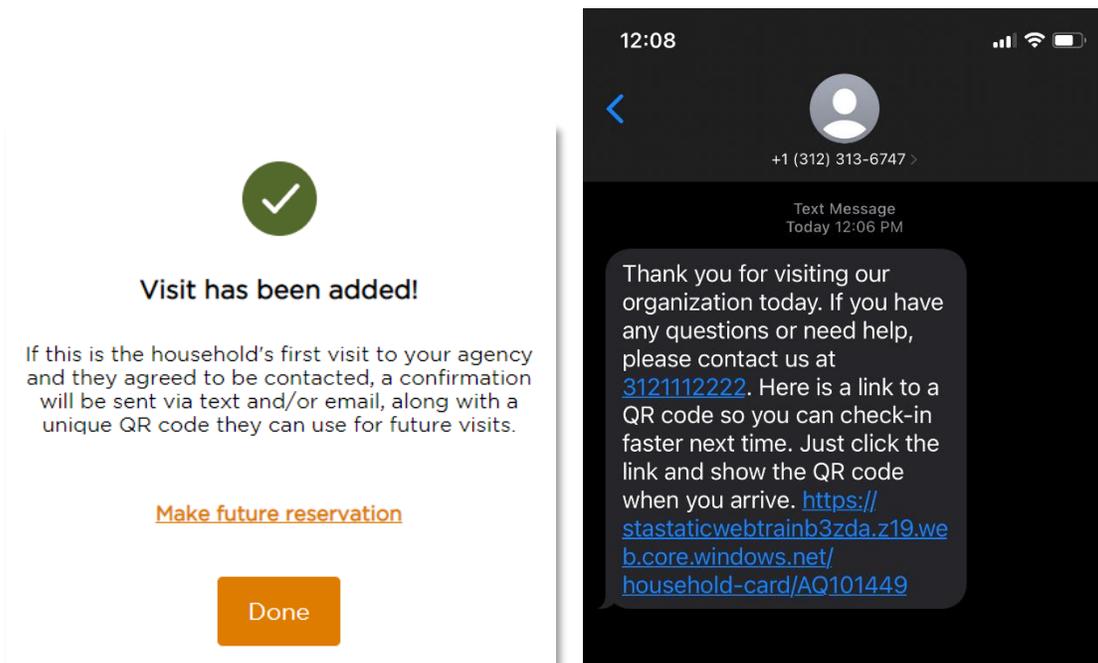
- **Proxy:** Select “yes” if there someone outside of the neighbor’s household is who may pick up food for them. Types of proxies include general proxy, case manager, authorized representative, and other.
- **Household Receipt of SNAP\***
- **Other Government Programs**
- **Employment Status**
- **Household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

4. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.
5. 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.
    - a. Add Pounds, Pieces, Meals and/or Dollars
  - **Add Additional Services to Visit:** select any additional services provided to the neighbor.
    - a. Add Pounds, Pieces, Meals and/or Dollars
  - **Print or Add Card:** A new or existing barcode can be used to make return visits a simple one-step process. Choose **Enter or Scan Barcode** to link a barcode card to the household's account. 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 Service Insights.
6. 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).
7. 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.

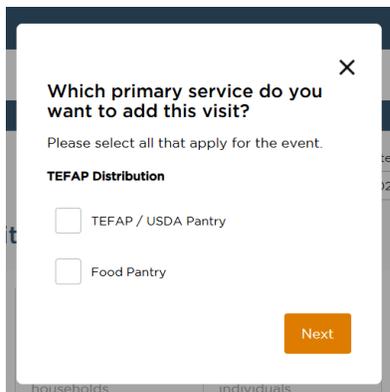
## ADD A NEW HOUSEHOLD (TEFAP)

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

- 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 nearby agency.**



- Choose the **primary service(s)** the neighbor is receiving. This will determine the **intake form** you complete with the neighbor. If you're serving this person TEFAP foods, select "TEFAP / USDA Pantry". If you're serving them non-TEFAP foods, select "Food Pantry". Click **Next** to begin adding the neighbor's household information.

A screenshot of a mobile application form. The title is 'Which primary service do you want to add this visit?' with a close button (X) in the top right. Below the title is the instruction 'Please select all that apply for the event.' Underneath, there is a section titled 'TEFAP Distribution' with two radio button options: 'TEFAP / USDA Pantry' and 'Food Pantry'. At the bottom right of the form is an orange 'Next' button. At the bottom of the screen, there are two tabs: 'households' (selected) and 'individuals'.

- **For TEFAP**, there are four steps to adding a new household. While these steps are the same in Maryland, Virginia, and Washington, DC, eligibility rules differ by region.
  1. **Eligibility**
  2. **Signature**
  3. **Household Info**
  4. **Finish Visit**

- 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. When selected, your agency's main address will be automatically entered in the address field.
- **A Note on Counties**: Clicking on an address suggestion will populate the other address fields. However, the "County" or "Ward" field will often remain blank for agencies in Washington, DC (which has wards, not counties) and Virginia (since some cities are independent and are not part of a county). If prompted, add the Ward or city manually.
- **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**

1234 Agency's 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

**Household**

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

Household Members

Household Members: 1

**Members** (This is not a requirement for TEFAP)

Remove #1

\*Status: Active

\*First Name: Member 1

Middle Name (Initial):

\*Last Name: \*

\* This is required

Add Member

Household

- **Proxy:** Select “yes” if there someone outside of the neighbor’s household is who may pick up TEFAP food for them. Types of proxies include general proxy, case manager, authorized representative, and other.
- **Other Government Programs:** This list will align with any categorical eligibility programs in your region. You may also select additional programs the neighbor receives. If the neighbor’s household qualifies for TEFAP based on categorical eligibility, the system will flag this automatically at the bottom of the eligibility page.
- **Income:** To qualify for TEFAP, the neighbor’s household income must be lower than a set amount, based on household size. This amount varies by region and has been automatically programmed into Service Insights.
- **Program Eligibility:** based on the above information, Service Insights will compute whether it believes the neighbor is eligible for TEFAP. If the neighbor is eligible, mark them as such.
- 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.**
- 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. 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.
  - **Verbal Signature:** Select this to “sign” for the client. Neither Maryland, Virginia, nor Washington, DC require neighbors to sign for receipt of TEFAP foods. Instead, simply select “Verbal Signature” to confirm the neighbor’s eligibility. Select **Save and Continue**.

\*Signee: Jane Doe | Date: 1/10/2025

Signature Type: Verbal Signature | \*Verbal Signature: Jane Doe

Verbal Signature

**USDA Nondiscrimination Statement**  
 In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

- 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 (asterisks denote required questions), but the list you see under Household Info will be pre-determined by the Capital Area Food Bank and the specific intake form you are using.
  - **Age\***
  - **Gender Identity\***
  - **Race or Ethnicity\***
  - **Age of members of the household\***
  - **Gender Identity of members of the household**
  - **Race or Ethnicity of members of the household**
  - **Preferred Language(s)**
  - **Employment Status**
  - **Household Military Status**
  - **Household Dietary Restrictions**
  - **Household Food Insecurity**
  - **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)

- Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.
- You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.

< Back
**Amanda Test**
TEFAP date last served: 9/20/22

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. ?

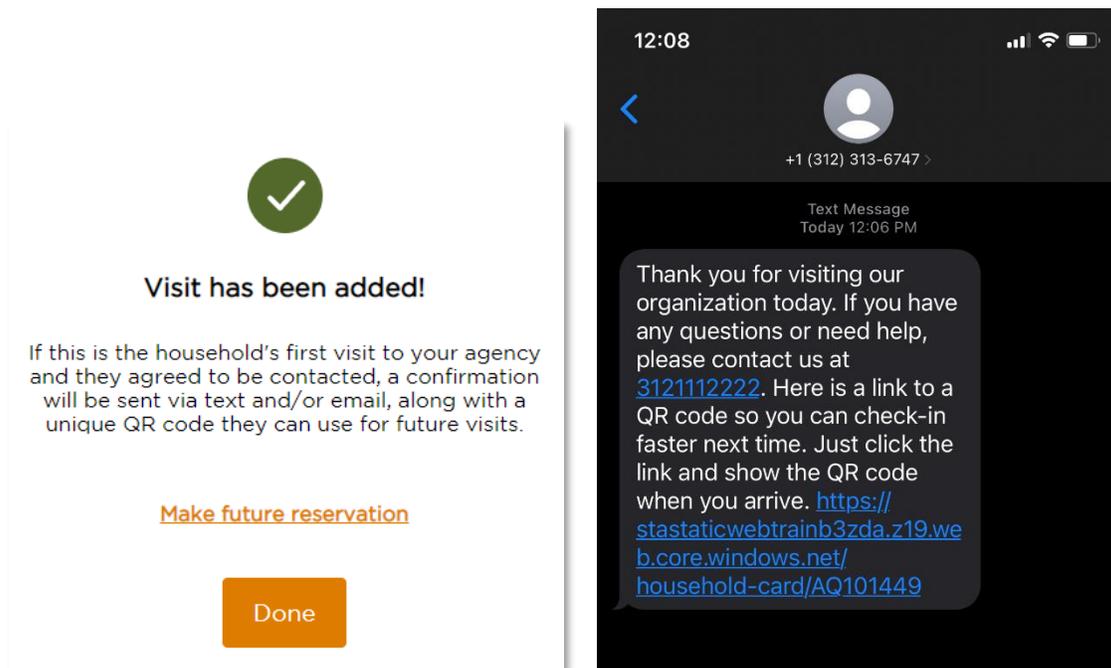
OR

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.
  - a. Add Pounds, Pieces, Meals and/or Dollars
- **Add Additional Services to Visit:** select any additional services provided to the neighbor.

- a. Add Pounds, Pieces, Meals and/or Dollars
- **Print or Add Card:** A new or existing barcode can be used to make return visits a simple one-step process. Choose **Enter or Scan Barcode** to link a barcode card to the household's account. 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 Service Insights.
- 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).
- 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.**

The screenshot shows a web interface for adding a new household. At the top, there is a dark blue banner with a white 'i' icon and the text 'Test Environment This is a test and training environment only. Please do not use this environment for live intake or activity.' Below this, the page title is 'Add New Household' and the visit date is '1/10/2025'. The main content area is divided into two steps: '1 Household Info' and '2 Finish Visit'. The 'Basic Information' section is expanded, showing fields for 'First Name' (Anonymous), 'Middle Name (Initial)', 'Last Name' (AS116233), 'Suffix' (Select), and 'Anonymous' (checked). There are also fields for 'Date of Birth' and 'Age'.

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.** This number is searchable in the same way a barcode is.
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

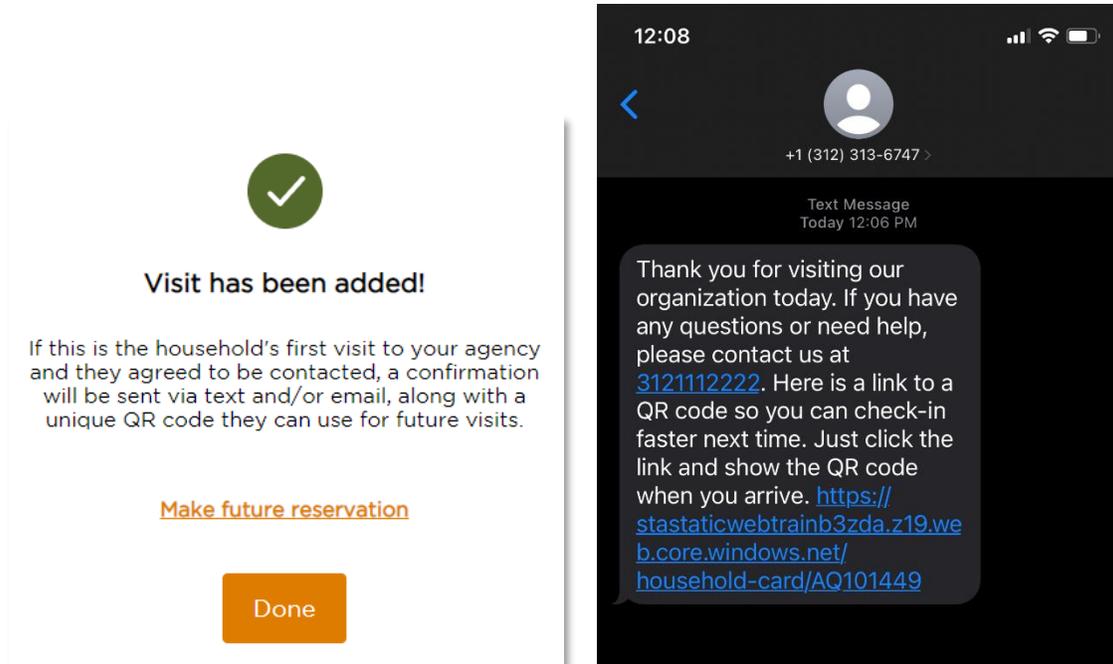
What method of communication do you prefer?

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.
  - **Add Additional Services to Visit:** select any additional services provided to the neighbor.
  - **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. A new or existing barcode can be used to make return visits a simple one-step process. Choose **Enter or Scan Barcode** to link a barcode card to the household's account. 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.
  - 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).

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



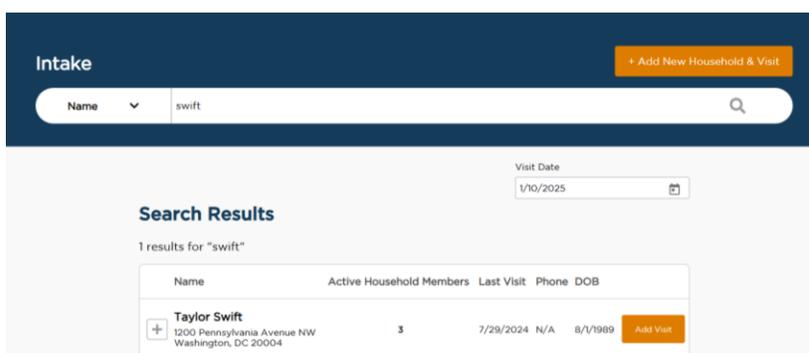
## ADD A RETURN VISIT

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 important for reducing duplicates in the system.

1. From the home screen, begin by searching Service Insights 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. When selected, the barcode icon will appear on the right-hand side of the search bar. Scanning a barcode card will pull up the neighbor's household profile. You can also type a barcode number directly into the search bar. If you are on a mobile device such as a phone or tablet, you can also use your device camera to scan a barcode by selecting the barcode icon on the right.



- **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 will 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*), last, first name (e.g., *Doe, John*), or last name, first initial (e.g., *J 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. If needed, 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. Agencies with multiple program locations and those who serve TEFAP will have multiple options. 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. If you need to delete a household member, the best way to do so is to mark them as **Permanently Inactive**.
    - iv. **Deceased:** Is deceased and does not count toward household size.

The screenshot shows a web form titled "Household". At the top, it asks "How many people in your household, not including yourself, will benefit from the services provided today?" with a help icon. Below this are three input fields: "Adults (18-59 yrs.)" with a value of 1, "Children (0-17 yrs.)" with a value of 0, and "Seniors (60+ yrs.)" with a value of 0. Each field has minus and plus buttons. Below these is the "Adults" section. It features a "Status" dropdown menu currently set to "Active", with a list of options: "Active", "Inactive", "Permanently Inactive", and "Deceased". To the right of the dropdown are input fields for "Middle Name (Initial)", "Last Name\*" (containing "Schooner"), "Date of Birth\*" (with a calendar icon), and "Age\*" (with an "OR" label and another input field). At the bottom left of the form is a link for "Additional Info" and a section header for "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 OR Age\*

05/06/1980 OR 40

**Contact**

Address

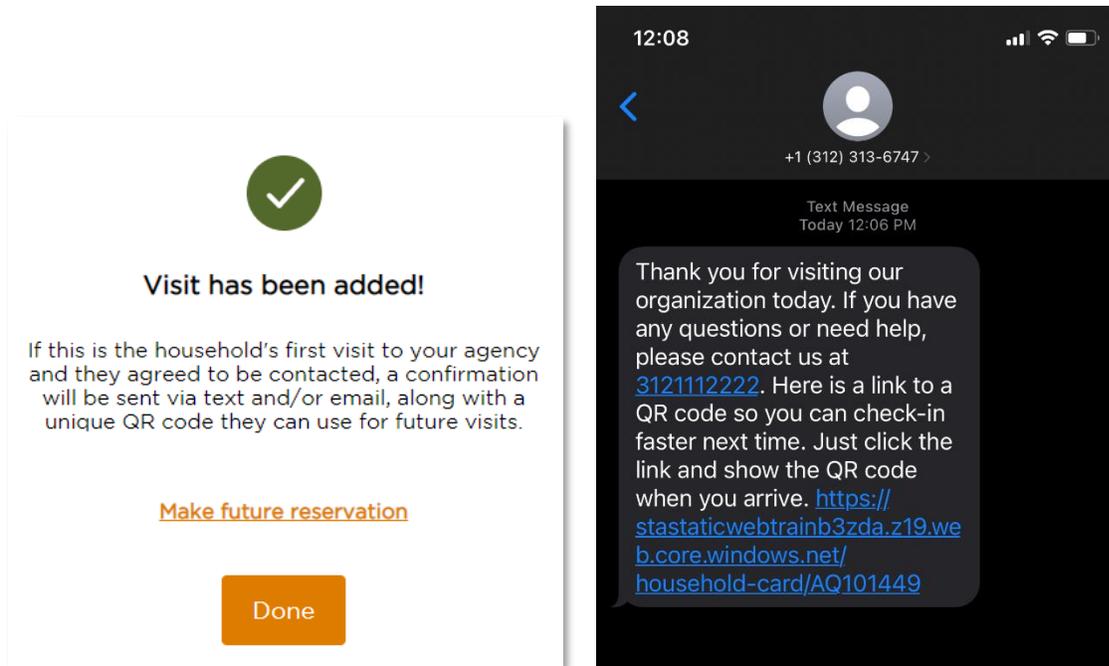
1234 Bloom St.  No fixed address

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.
  - **Add Additional Services to Visit:** select any additional services provided to the neighbor.

- **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 **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.

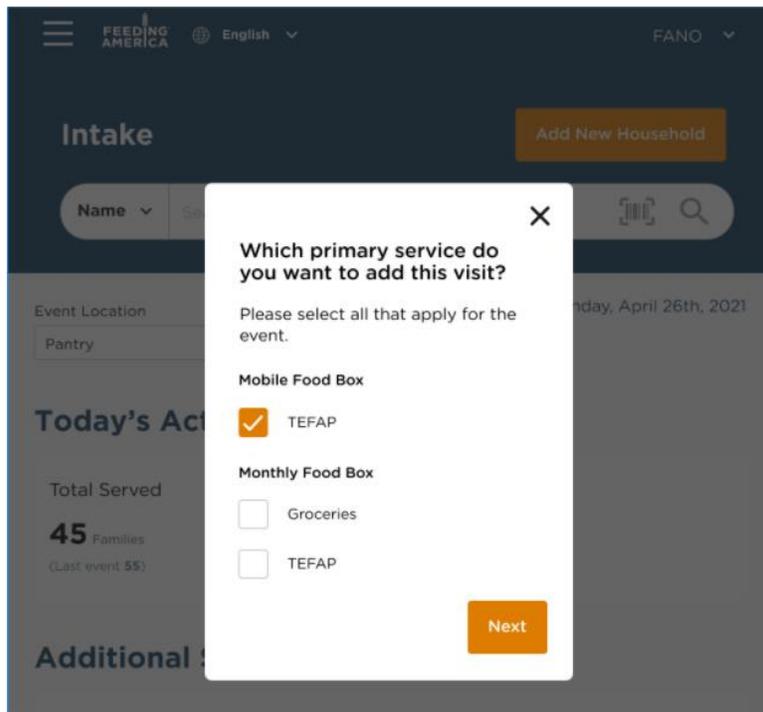


At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

## ADD A RETURN VISIT (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.



The screenshot shows the 'Intake' screen of the FEEDING AMERICA system. A modal dialog is open in the center, titled 'Which primary service do you want to add this visit?'. The dialog asks the user to 'Please select all that apply for the event.' and lists two categories of services: 'Mobile Food Box' and 'Monthly Food Box'. 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 located at the bottom right of the dialog. The background shows the 'Intake' form with fields for 'Event Location' (Pantry), 'Today's Act', 'Total Served' (45 Families), and 'Additional'.

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.

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.
6. 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: Eugene Krabs      Phone: [Redacted]

Address: 101 Duke St

City, State: Alexandria, VA      ZIP: 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

7. 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](#).

The screenshot shows a web interface for a user named 'Minnie Mouse'. At the top, there is a navigation bar with 'Home', 'English', and 'Apple Agency Admin'. Below this is a progress indicator with four steps: 'Eligibility', 'Signature', 'Household Info' (the current step), and 'Finish Visit'. The main heading is 'Minnie Mouse'. Below the heading is a question: 'Has any of your information changed?'. Underneath is a section titled 'Race / Ethnicity' with the question 'What race or ethnicity do you identify as?'. There are nine radio button options: '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' (which is selected), and '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 at [serviceinsights@capitalareafoodbank.org](mailto:serviceinsights@capitalareafoodbank.org).

## 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 **View Household Info** feature.

Name	Active Household Members	Last Visit	Phone	DOB
<b>Taylor Swift</b> 1200 Pennsylvania Avenue NW Washington, DC 20004	3	7/29/2024	N/A	8/1/1989

Alt ID #	Household Members	Proxy
AQ105835	Phoebe Bridgers	N/A
051530	Jack Antonoff	
098404		
106609		
AQ108177		

Preferred Language	TEFAP Status	Notes
Amharic	ELIGIBLE [10/1/2025 Recertification date]	

**View Household Info**

Last TEFAP Visit: 7/29/2024

Mark as duplicate **Reserve For Future Event**

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 **View Household Info**.

### Household Profile

Household Info | Visit History | Reservations

**Basic Information**

First Name: Taylor | Middle Name (Initial): | Last Name: Swift

Suffix:  |  Anonymous

Date of Birth: 8/1/1989 | OR | Age: 35

**Gender Identity**

What gender do you identify as?

Male |  Female |  Transgender

- 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 information from a specific past visit, you will need to do so through Household Visit History.
- 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.*

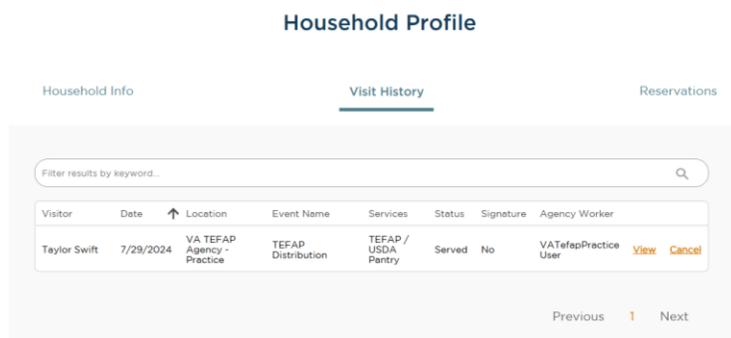
The screenshot shows the 'Intake' section of a web application. At the top, there is a search bar with the text 'test' and a magnifying glass icon. Below the search bar, the page displays 'Search Results' for 'test', showing 3 results. The first result is for a household named 'TEST TEST' with the address 'S Testa Dr'. The household details include an Alt ID # 'AQ101202', address 'S Testa Dr, Naperville Township, IL 60540', and household members. There is a 'View Full History' link highlighted with a red box. Below the household details, there is a table for 'Recent Visit History' with columns for Date, Program Location, Services, and Status.

Name	Last Visit	Phone	DOB
TEST TEST S Testa Dr	11/11/2021	1111111111	2/2/1999

Date	Program Location	Services	Status
11/11/2021	Microsoft Theatre	Jewel Pre-pack	Served
10/16/2021	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 #
2. Once you identify the correct household record, expand the record using the + icon to the left of the name.
  3. Click **View History**.



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.
  - **Event Name:** the name of the event 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.
  - **Agency Worker:** the user who recorded the visit.
5. 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.

[Back](#)
**Taylor Swift**
Visit Date: 7/29/2024

Location: VA TEFAP Agency - Practice

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

Name: Taylor Swift      Phone:

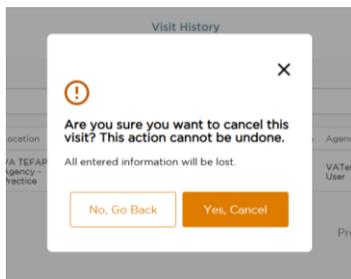
Address: 1200 Pennsylvania Avenue NW

City, State: Washington, DC      ZIP: 20004

Number of people in your household:

Members:

- 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.*

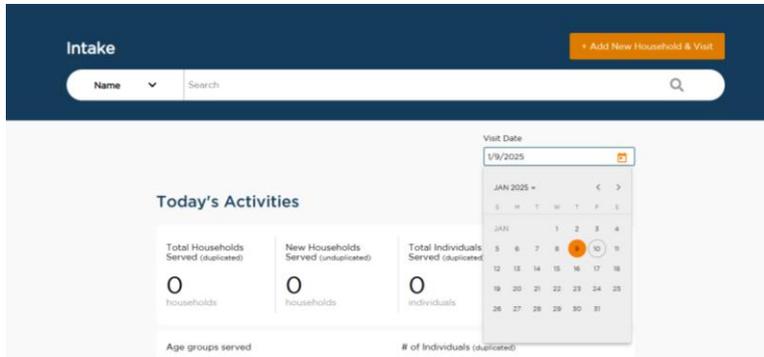


- When you are finished viewing a household’s visit history, click the **home button** on the top left to return to the Home Screen.

## 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.**

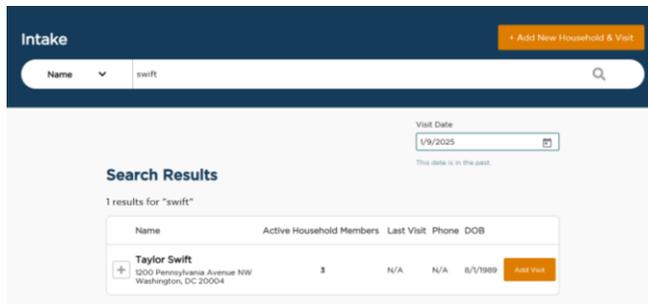
- If the past Event has not yet been created, you will need to do that first.
- From the home page, **change the “Visit Date”** on the calendar to the date of the past event.



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

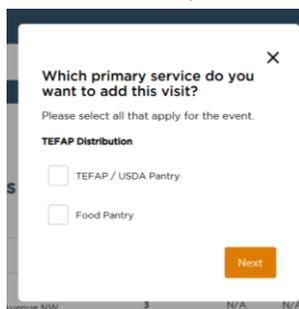


3. **Search for or add your new neighbor** (see “Add New Household” or “Add Return Visit” sections for more details.)



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.)

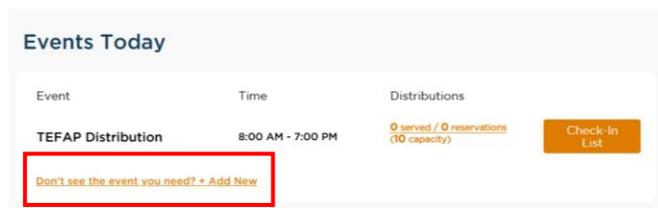


6. When you have finished adding any past visits, be sure to change the date back to today on the calendar.

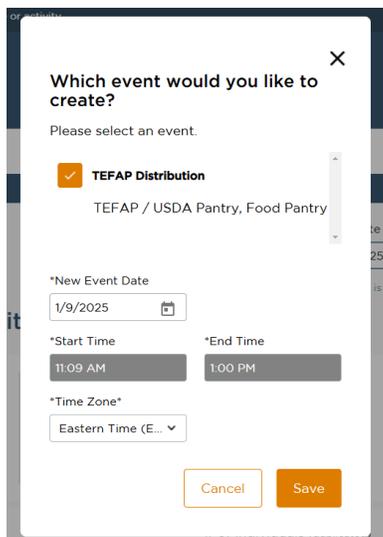
## AD HOC EVENT CREATION

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.

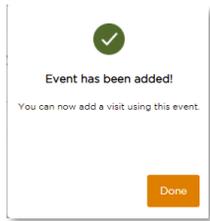
1. From the home page, scroll down to the “Events Today” section and click on the link that says **Don’t see the event you need? + Add New**



2. From the pop-up window, select an **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.



- 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.**



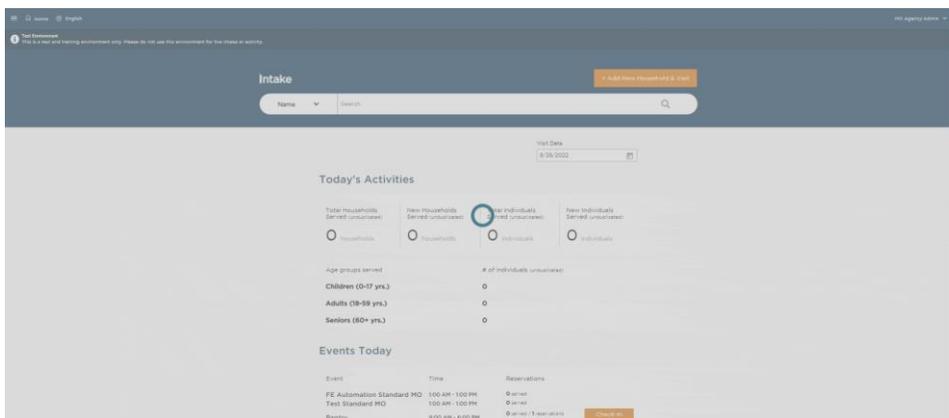
- If the same event already exists on the selected date, you will get an error message and be asked to choose a different event and/or date.

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## 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.

- 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.

### All Events With Reservations

\*Date Range  
 1/10/2025 TO 2/10/2025 [Export to excel](#) [Update](#)

Filter results by keyword

Date	Time	Agency Name	Event	Services	Total Reservations	Capacity	
1/10/2025	8:00 AM - 7:00 PM	VA TEFAP Agency - Practice	TEFAP Distribution	TEFAP / USDA Pantry, Food Pantry	0	10	<a href="#">Reserve</a>
1/11/2025	8:00 AM - 7:00 PM	VA TEFAP Agency - Practice	TEFAP Distribution	TEFAP / USDA Pantry, Food Pantry	0	10	<a href="#">Reserve</a>

### 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.

### TEFAP Distribution Reservations

Event Date: 1/12/2025  
 Event Time: 8:00 AM - 7:00 PM

Total Capacity	Total Reservations	Remaining Capacity	Total Served
10	3	7	0

Event Reservations Neighbor Search Recently Served

Visit Date: 1/12/2025 [Export to excel](#) [Add New Household & Reservation](#)

Filter results by keyword

Date/Time	Name	Active Household Members	Phone	Servi	Status
1/12/2025 8:00 AM - 7:00 PM	Thom Yarka	1	N/A	TEFA	Reserved
1/12/2025 8:00 AM - 7:00 PM	Tavlor Smith	3	N/A	TEFA	Reserved
1/12/2025 8:00 AM - 7:00 PM	Bevonna Khouklas	4	919-220-3333	TEFA	Reserved

## 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 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 'TEFAP Distribution Reservations' interface. At the top, it shows the event date as 1/12/2025 and the event time as 8:00 AM - 7:00 PM. Below this is a summary table with four columns: Total Capacity (10), Total Reservations (3), Remaining Capacity (7), and Total Served (0). There are three tabs: 'Event Reservations', 'Neighbor Search' (which is selected), and 'Recently Served'. Under the 'Neighbor Search' tab, there is a 'Search Results' section with a prompt 'Please enter a search term.' and a search input field with a dropdown menu for 'Name' and a search icon. A button labeled 'Add New Household & Reservation' is also visible. The search results area currently shows 'no search results'.

Total Capacity	Total Reservations	Remaining Capacity	Total Served
10	3	7	0

Event Reservations | **Neighbor Search** | Recently Served

**Search Results** [Add New Household & Reservation](#)

Please enter a search term.

Name Search

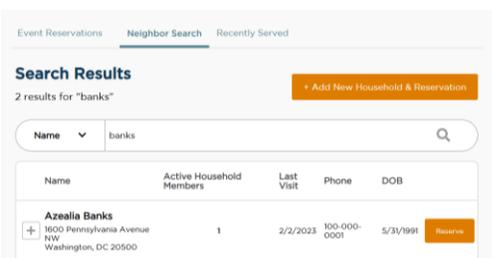
no search results

## ADD NEW RESERVATION

### Search

This search box works the same as the search box on the home screen. This search will show neighbors who are already in the system.

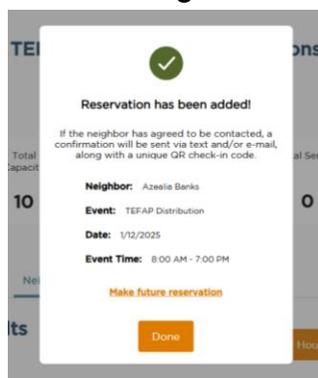
1. **Search** for a neighbor
2. Click the **“Reserve”** button



The screenshot shows the 'Neighbor Search' interface. At the top, there are tabs for 'Event Reservations', 'Neighbor Search', and 'Recently Served'. Below the tabs, the 'Search Results' section shows '2 results for "banks"'. A search bar contains the text 'banks'. Below the search bar is a table with the following columns: Name, Active Household Members, Last Visit, Phone, and DOB. The table contains one row for 'Azealia Banks' with the following details: 1600 Pennsylvania Avenue NW, Washington, DC 20500, 1 Active Household Members, 2/2/2023 Last Visit, 100-000-0001 Phone, and 5/31/1991 DOB. A 'Reserve' button is visible next to the row.

Name	Active Household Members	Last Visit	Phone	DOB
Azealia Banks 1600 Pennsylvania Avenue NW Washington, DC 20500	1	2/2/2023	100-000-0001	5/31/1991

3. Select **Primary Service** and click **Next**, if prompted.
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.**



### 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**, if prompted.
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 \(TEFAP\)](#).

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**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

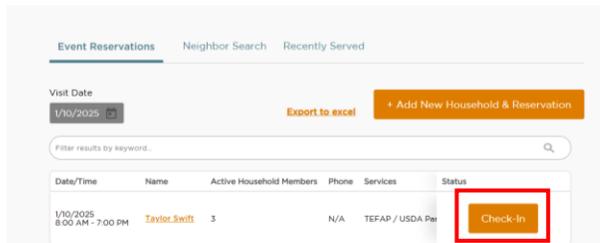
4. Click **Finish** to make the reservation and save all information. A pop-up will appear confirming that the reservation has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household 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.**

## SERVE A RESERVATION

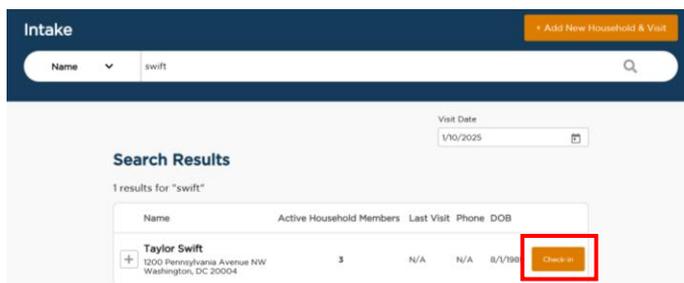
A reservation can be served two ways. **The first is to use the Check-In List.** This is ideal for large distributions in which all neighbors will have a reservation. **The second is to use the search from**

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).)



2. 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.



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## DUPLICATE MANAGEMENT

Staff at the Capital Area Food Bank will merge duplicate profiles from time to time. Agency Admins do not need to manage duplicate profiles. However, you can easily flag duplicate profiles during intake.

### IDENTIFY A DUPLICATED HOUSEHOLD DURING INTAKE

During the intake process, 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**

**Intake** + Add New Household

Name hamilton 🔍

Visit Date  
1/21/2022 📅

### Search Results

4 results for "hamilton"

	Name	Last Visit	Phone	DOB	
+	<b>Alexander Hamilton</b> 400 foodbank dr	1/21/2022		1/1/1982	<a href="#">Add Visit</a>
+	<b>Alexander Hamilton</b> 400 foodbank dr	1/21/2022		1/1/1982	<a href="#">Add Visit</a>
+	<b>Eliza Hamilton</b> 400 foodbank dr	1/21/2022		1/1/1997	<a href="#">Add Visit</a>
+	<b>Eliza Hamilton</b> 400 foodbank dr	1/21/2022		1/1/1989	<a href="#">Add Visit</a>

2. Click the + to expand the family information

### Search Results

4 results for "Hamilton"

	Name	Last Visit	Phone	DOB	
-	<b>Alexander Hamilton</b> 400 foodbank dr	N/A		1/1/1964	<a href="#">Add Visit</a>

**Alt ID #** **AQ103541**

**Address** **400 foodbank dr  
Columbus, OH 43123**

**Household members**  
**Eliza Hamilton**  
**Phillip Hamilton**

Proxy Preferred Language

Notes [Edit/View Household Info](#)  
[More Notes](#)

Mark as duplicate

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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. **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.**

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# APPENDIX

## VERSION RELEASES & BUG FIXES

Feeding America makes regular small fixes and improvements, in addition to larger feature releases. The Capital Area Food Bank will send out a quarterly newsletter to agencies using Service Insights to note new features, enhancements, and bug fixes.

## 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*
- The Capital Area Food Bank will provide you with one laptop, though you are free to purchase additional devices.

### Other Devices

- Barcode scanner
  - There are many 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.
  - The Capital Area Food Bank will provide you with one scanner, though you are free to purchase additional ones.

### MOBILE DISPLAY

Service Insights 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:

