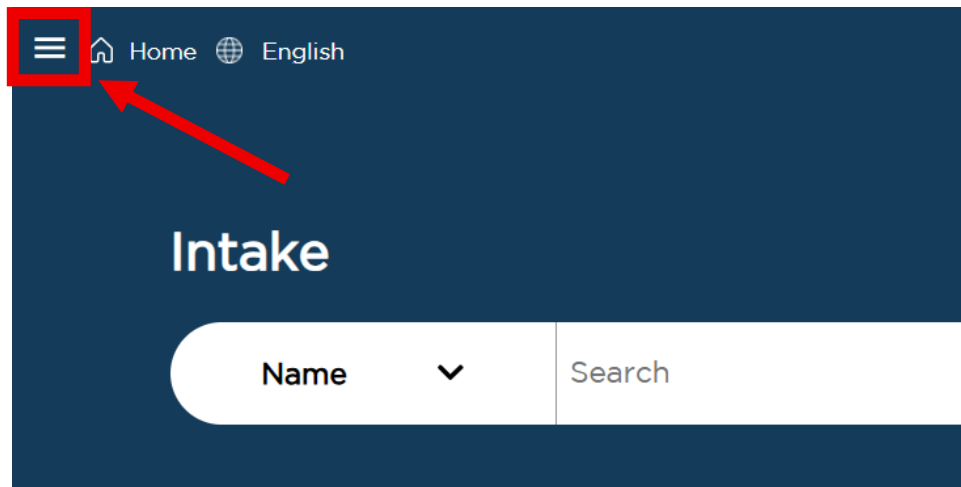


How to Setup Offline Mode on Neighbor Intake on Service Insights

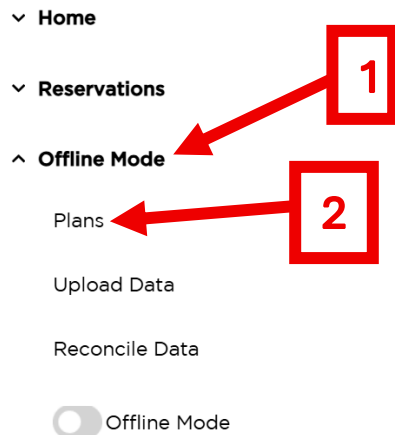
The following guide will work on any device that can open a web browser and navigate to the Neighbor Intake page.

NOTE: You must be connected to the internet BEFORE setting up Offline Mode.

1. On the Service Insights / Neighbor Intake Homepage on Chrome, click the 'hamburger' drop down menu icon



2. Select 'Offline Mode' (1), then select 'Plans' (2)






3. Select 'Create New Plan'

Offline Plans

When you are ready to go offline and download your plan, please confirm your selections and lock your plan. You must lock your plan prior to downloading

*Date Range

4/29/2026  TO 5/29/2026  Update Refresh Create New Plan

Filter results by keyword... 

4. Type in a name for the plan (1). For example: Cambria Distribution 5/19. Then select 'Next' (2)

Name Offline Plan

Name your Plan and then begin making data selections for offline usage

1

Plan Name

*Name of Plan

Cambria Distribution 5/19

2



Cancel Next


5. Select the corresponding event that matches the desired date. NOTE: You can only select ONE event.

All Events Eligible for Offline Mode

Select an event to save to your device

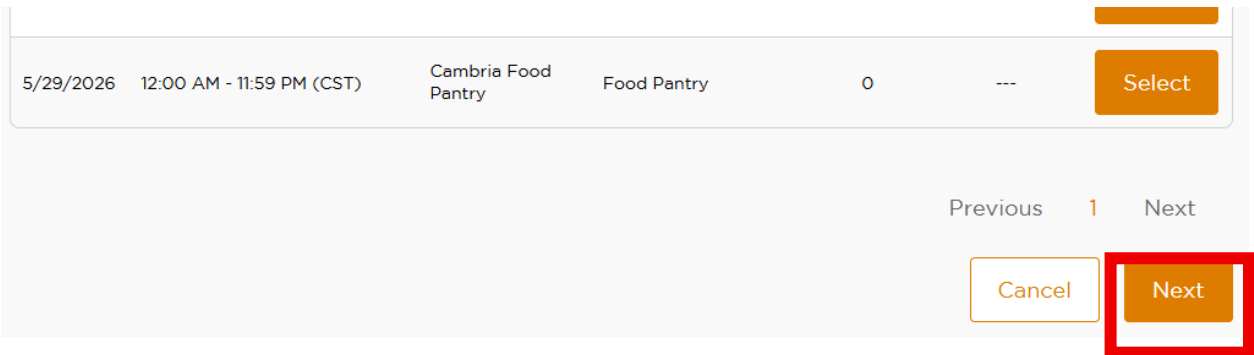
*Date Range

5/19/2026  TO 5/29/2026  Update

Filter results by keyword... 

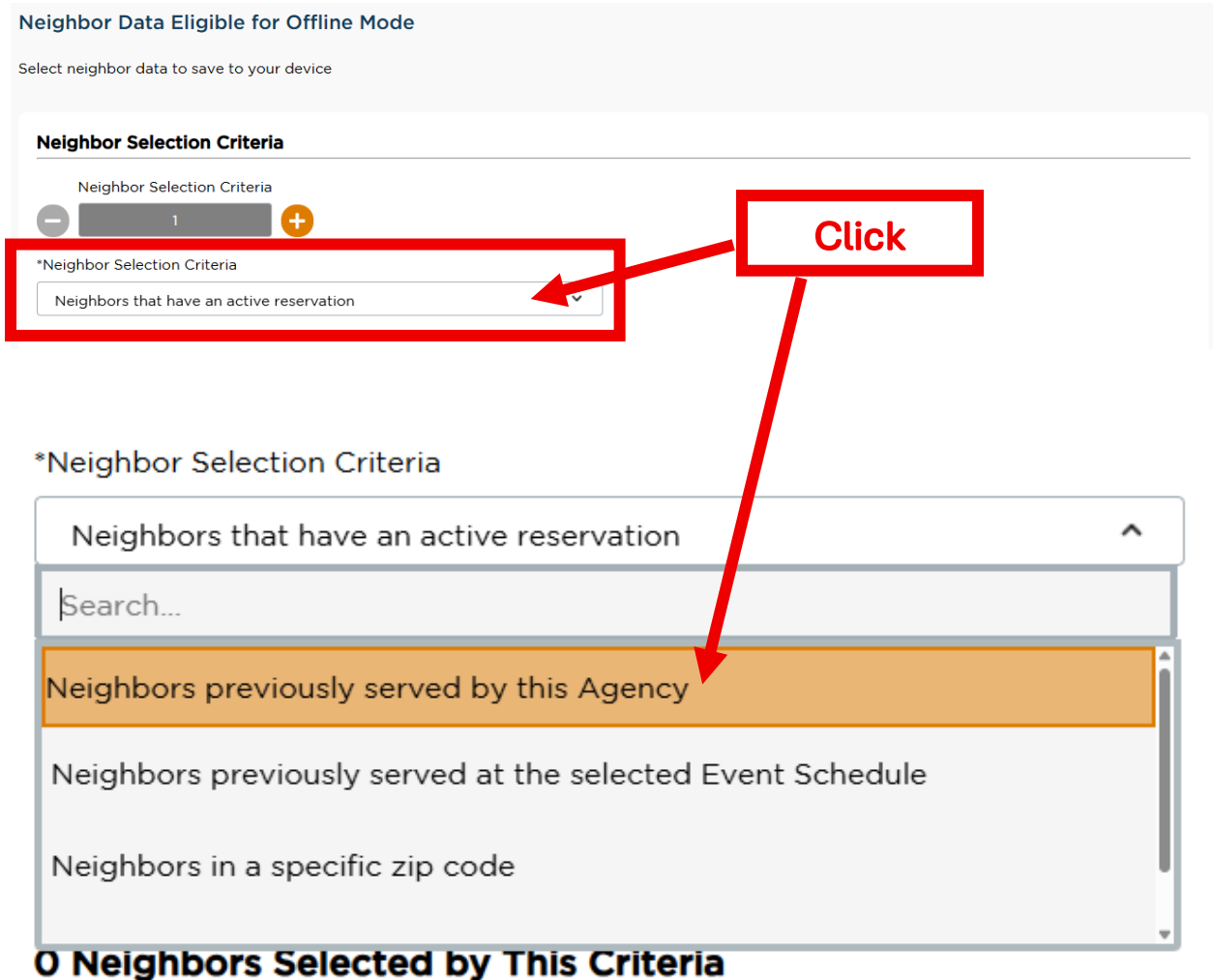
Date	Time	Event	Services	Total Reservations	Capacity	
5/19/2026	12:00 AM - 11:59 PM (CST)	Cambria TEFAP	USDA/TEFAP	0	---	Select
5/19/2026	12:00 AM - 11:59 PM (CST)	Cambria Food Pantry	Food Pantry	0	---	Select

6. Scroll down to the bottom of the page and select 'Next'



The screenshot shows a table row with the following data: 5/29/2026, 12:00 AM - 11:59 PM (CST), Cambria Food Pantry, Food Pantry, 0, and a 'Select' button. Below the table, there are navigation buttons: 'Previous', '1', and 'Next'. At the bottom right, there are two buttons: 'Cancel' and 'Next'. The 'Next' button is highlighted with a red box.

7. Click the 'Neighbor Selection Criteria' drop down and select 'Neighbors previously served by this Agency'



The screenshot shows the 'Neighbor Selection Criteria' section. It includes a header 'Neighbor Selection Criteria' and a sub-header 'Neighbor Selection Criteria' with a minus sign, a '1' in a box, and a plus sign. Below this is a dropdown menu with the text '*Neighbor Selection Criteria' and 'Neighbors that have an active reservation'. A red box highlights the dropdown menu, and a red arrow points to it with the word 'Click' in a red box. Below the dropdown menu is a search bar with the text 'Search...'. The dropdown menu is open, showing a list of options: 'Neighbors that have an active reservation', 'Neighbors previously served by this Agency', 'Neighbors previously served at the selected Event Schedule', and 'Neighbors in a specific zip code'. The option 'Neighbors previously served by this Agency' is highlighted in orange. Below the dropdown menu is the text '0 Neighbors Selected by This Criteria'.

8. Update the 'From' Date Range to 1/1/2024. You can either type in DD/MM/YYYY format, or click calendar icon.

*Date Range

 TO 

9. Click 'Update Selected Counts' then 'Next'. Note: The number displayed will change based on date range.

1

Click button to display neighbor count (optional)

0 Neighbors Selected by This Criteria

2

10. Click 'Save Plan', then 'Done'

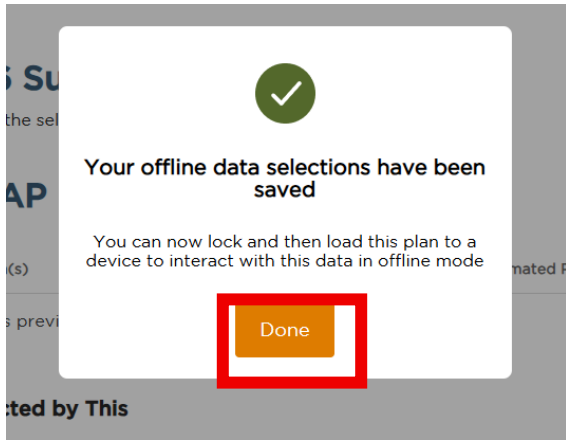
Cambria 5/26 Summary

Please review and confirm the selections you have made

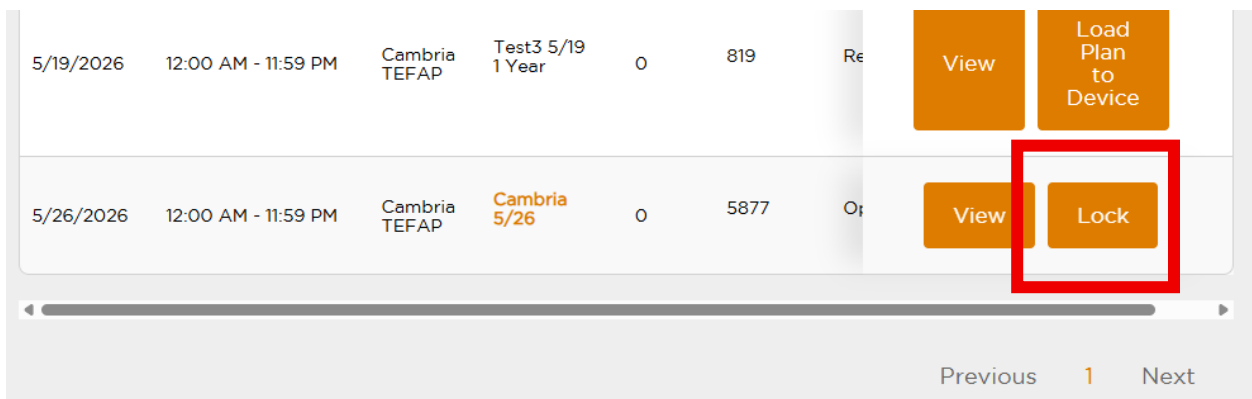
Cambria TEFAP

Filter Selection(s)	Estimated Plan Neighbors
All Neighbors previously served by this Agency [1/1/2024 - 4/30/2026]	5877

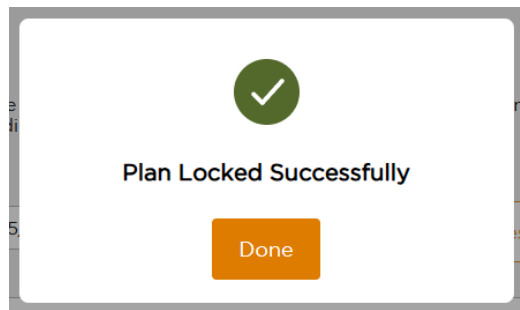
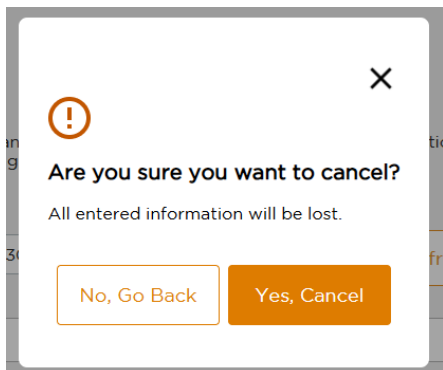
5877 Neighbors Selected by This Criteria



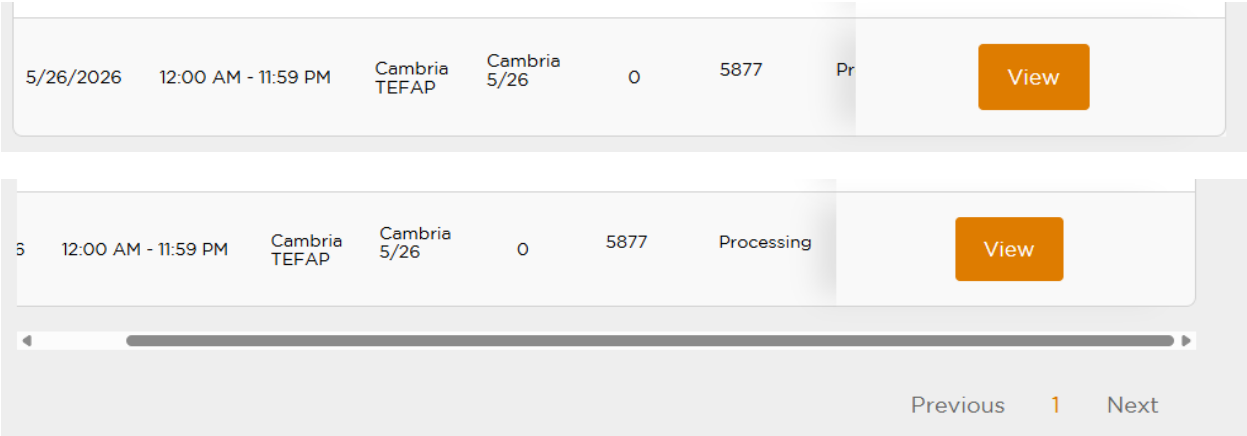
11. From list, find correct plan / plan date, then click 'Lock'.
Note: You may need to scroll down if there are multiple plans.



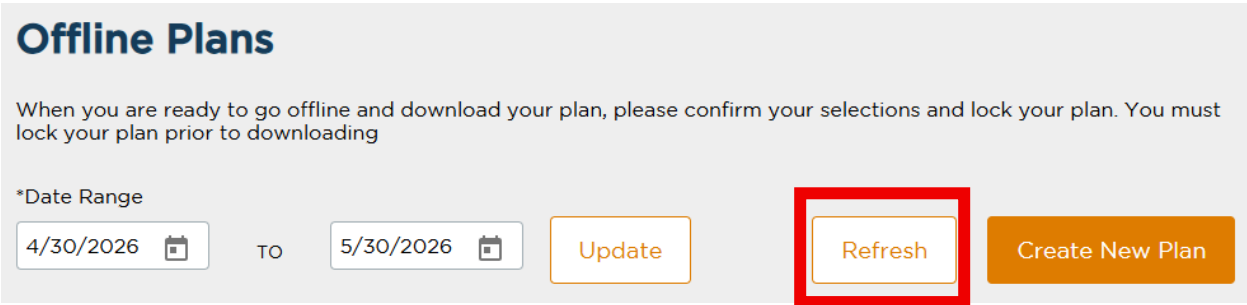
12. Click 'Yes, Cancel', then 'Done'. Note: The 'Yes, Cancel' response is probably a programming error. Just click whatever orange button pops up here.



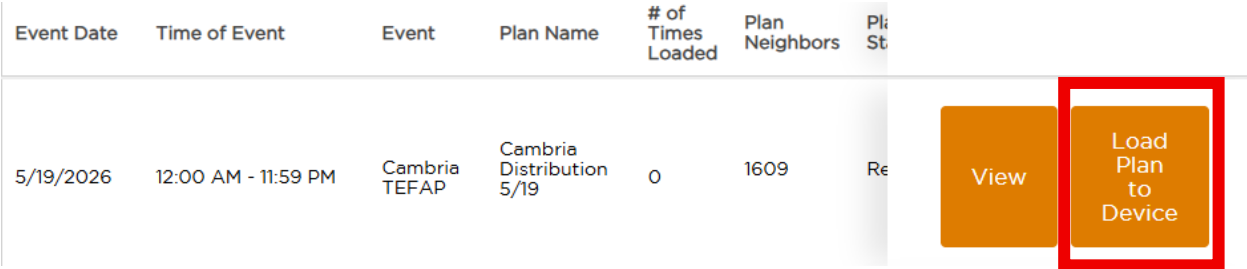
13. It will now say 'Processing'. Note: You will need to click and drag slider to the right to fully see the word 'Processing', but it's not necessary.



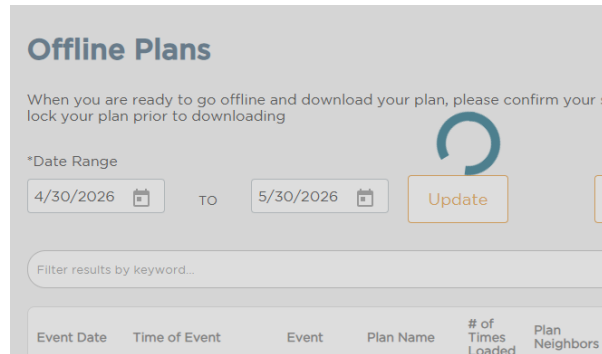
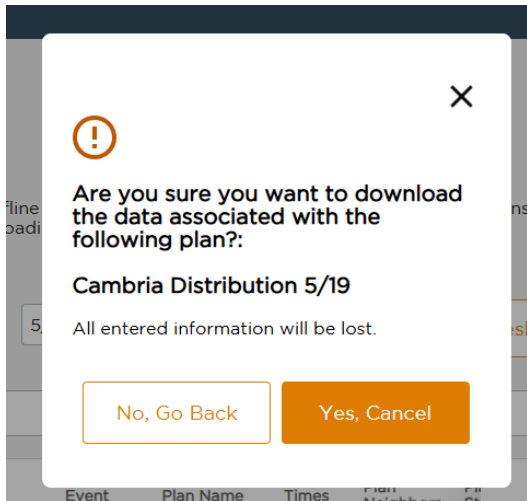
14. Wait about 2-5 minutes, then scroll to the top of page and click 'Refresh'



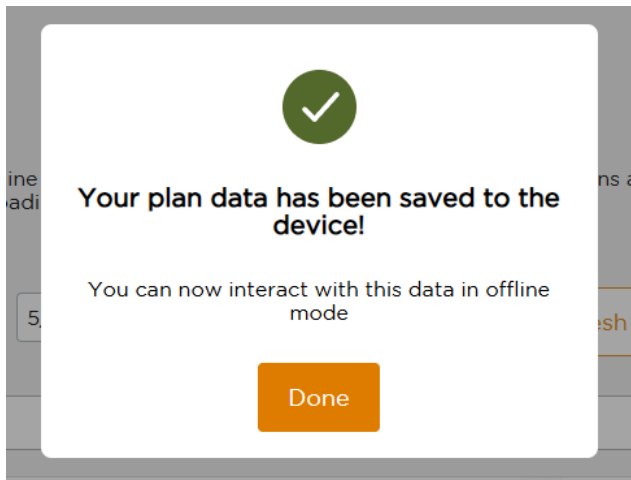
15. Click 'Load Plan to Device'



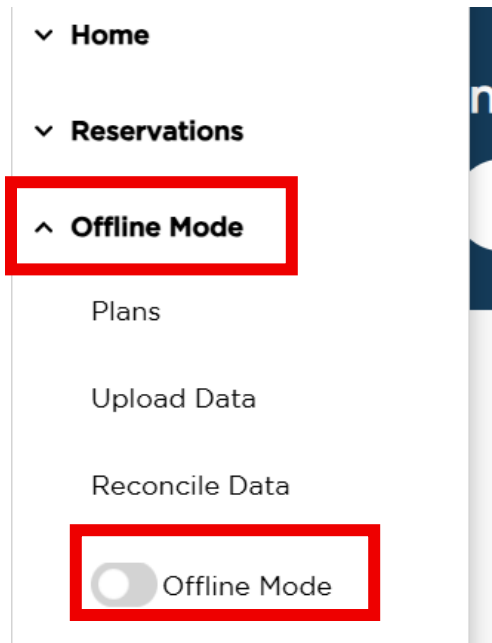
16. Click 'Yes, Cancel', then wait for plan to load



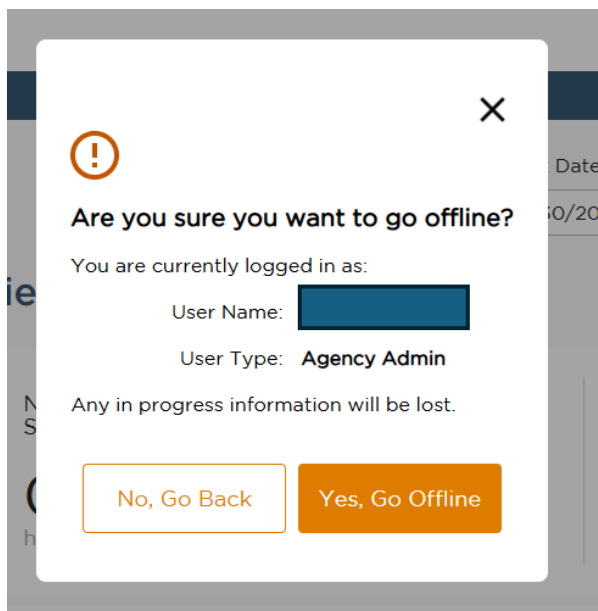
17. Click 'Done'



18. Offline mode is now ready. On the day of the event, **while the same device is still connected to the internet,** click the 'hamburger' menu drop down, click 'Offline Mode', then 'Offline Mode'

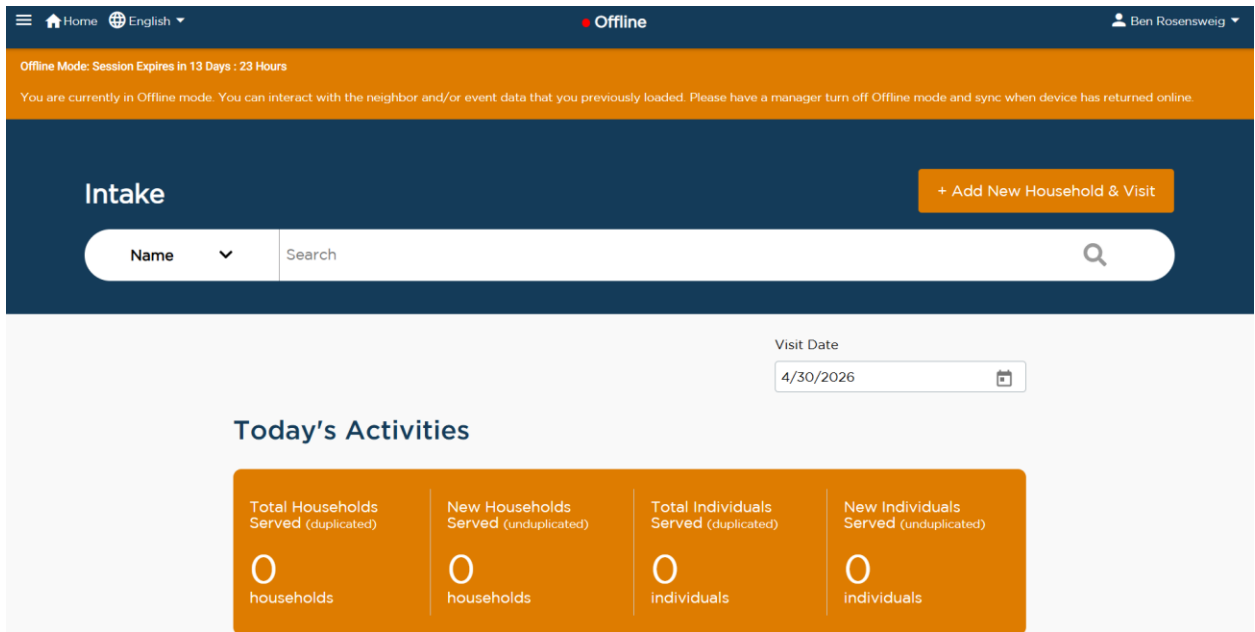


19. Click 'Yes, Go Offline'



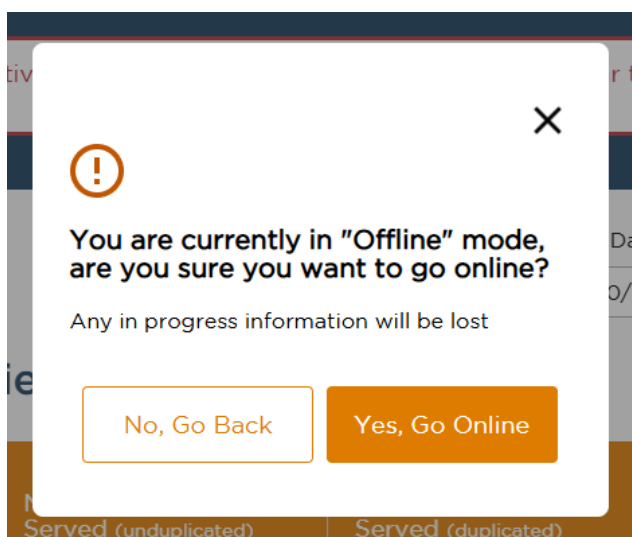
20. Your screen will look like the following. There will be an orange band at the top of the screen with text.

You are now able to do intake without a connection to the internet.



AFTER THE EVENT

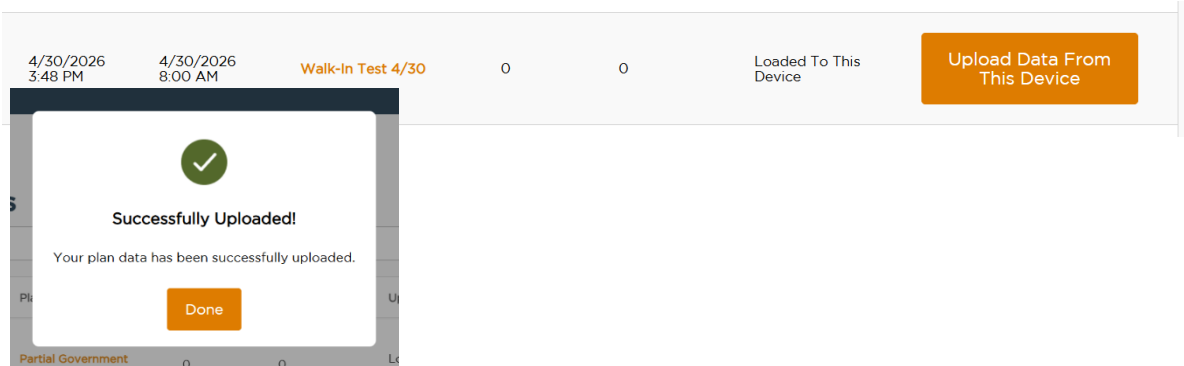
1. When the event is done, and you have reconnected to the internet, click the menu drop down, click 'Offline Mode' and click 'Offline Mode'. Then click 'Yes, Go Online' at the pop-up.



2. From Menu under Offline Mode, Select "Upload Data"

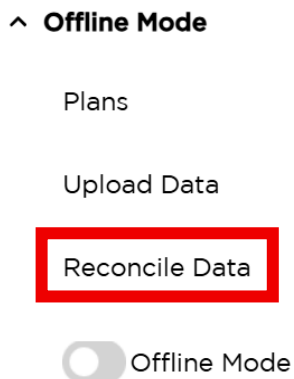


3. Click button "Upload Data From This Device", then 'Done'



4. If any other devices were used for this particular date / event / Offline Plan, make sure all devices have gone through steps 1-4.

5. Once all devices have uploaded data, navigate to main menu and select "Reconcile Data"



The Reconcile step is made of 3 sections:

Go through each of the three sections to add visits and households to SIMC.

Note: you can select one or multiple rows.

- 1. Existing Neighbors Served:** These are returning neighbors who have visits added for them. Note: there may not be any data listed – that’s ok. Click on the next section.
- 2. Households With No Potential Matches:** These are new households who are served and do not meet the threshold for a potential duplicate
- 3. Households with Potential Matches:** These are new households who are served and do meet the threshold for a potential duplicate.

4/30/2026 8:00 AM	DHS Shutdown Distribution 2026 8:30AM - 9:30AM	Walk-In Test 4/30	3	0	3	0	3	1/1	Ready	Reconcile
Existing Neighbors Served			Households With No Potential Matches				Households With Potential Matches			

Reconcile Data (Walk-In Test 4/30)

These households were added as new households at the event. Review the list and associated details before adding.

Filter results by keyword...

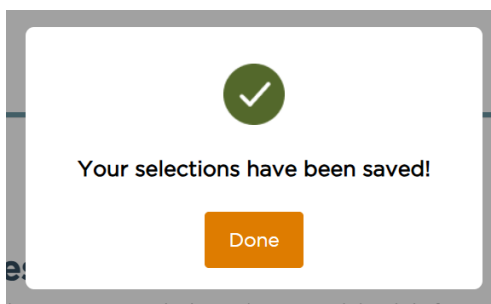
Name	Date/Time	Event Name	DOB	Address	Household Size	Add Household Visit
Offline FN Test 1 Offline LN Test 1	4/30/2026 8:00 AM - 10:00 AM	DHS Shutdown Distribution 2026 8:30AM - 9:30AM	1/1/2025	70 Corporate Woods Dr Bridgeton, Missouri 63044	1	<input type="checkbox"/> Add
Offline FN Test 2 Offline LN Test 2	4/30/2026 8:00 AM - 10:00 AM	DHS Shutdown Distribution 2026 8:30AM - 9:30AM	1/1/1991	70 Corporate Woods Dr Bridgeton, Missouri 63044	2	<input type="checkbox"/> Add
Offline FN Test 3 Offline LN Test 3	4/30/2026 8:00 AM - 10:00 AM	DHS Shutdown Distribution 2026 8:30AM - 9:30AM	1/1/2001	70 Corporate Woods Dr Bridgeton, Missouri 63044	3	<input type="checkbox"/> Add

Click check box next to Add for all households listed. Then click 'Save', then click 'Done'

Name	Date/Time	Event Name	DOB	Address	Household Size	Add Household Visit
Offline FN Test 1 Offline LN Test 1	4/30/2026 8:00 AM - 10:00 AM	DHS Shutdown Distribution 2026 8:30AM - 9:30AM	1/1/2025	70 Corporate Woods Dr Bridgeton, Missouri 63044	1	<input checked="" type="checkbox"/> Add
Offline FN Test 2 Offline LN Test 2	4/30/2026 8:00 AM - 10:00 AM	DHS Shutdown Distribution 2026 8:30AM - 9:30AM	1/1/1991	70 Corporate Woods Dr Bridgeton, Missouri 63044	2	<input checked="" type="checkbox"/> Add
Offline FN Test 3 Offline LN Test 3	4/30/2026 8:00 AM - 10:00 AM	DHS Shutdown Distribution 2026 8:30AM - 9:30AM	1/1/2001	70 Corporate Woods Dr Bridgeton, Missouri 63044	3	<input checked="" type="checkbox"/> Add

Previous 1 Next

Cancel Save



You have now completed Offline Mode!