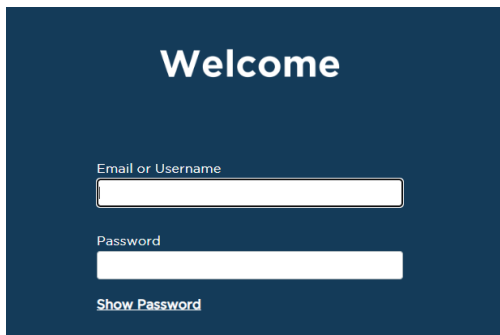


Service Insights on MealConnect (Neighbor Intake Program) Quick Guide: Creating Event Schedules

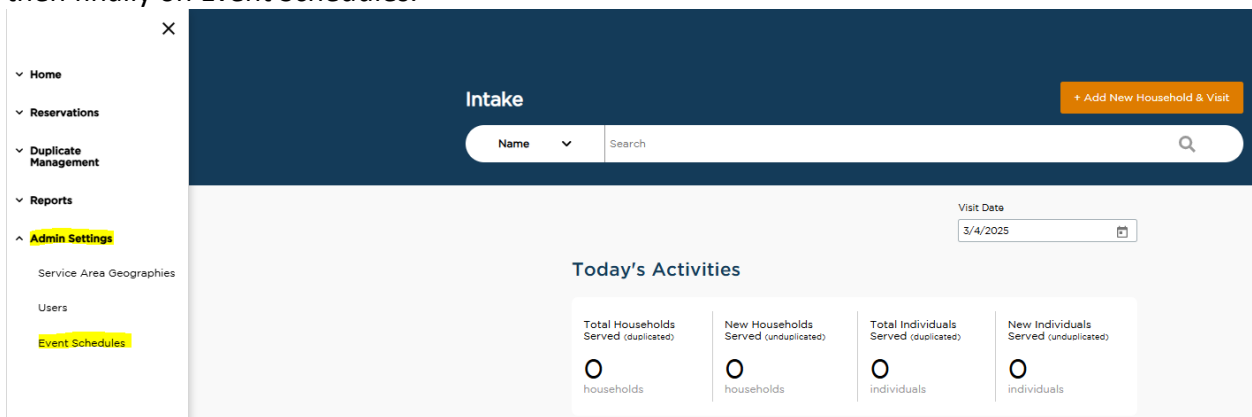
This is a quick guide on creating event schedules on Service Insights. You must create an event schedule for your agency to be able to do neighbor intake, and it will also determine the intake form that you will be using. Only the Foodbank Admin and Agency Admin accounts can create an event schedule.

Step #1: Log into Service Insights (Neighbor Intake Program)



The login screen features a dark blue background with the word "Welcome" in white at the top. Below it are two white input fields: "Email or Username" and "Password". A "Show Password" link is positioned below the password field.

Step #2: Click on the menu button at the top left corner of the screen, then on Admin Settings, then finally on Event Schedules.



The screenshot shows the "Intake" dashboard. On the left is a navigation menu with options: Home, Reservations, Duplicate Management, Reports, Admin Settings (highlighted), Service Area Geographies, Users, and Event Schedules (highlighted). The main content area has a header with "Intake" and a "+ Add New Household & Visit" button. Below the header is a search bar with "Name" and "Search" fields. A "Visit Date" selector shows "3/4/2025". The "Today's Activities" section contains four cards: "Total Households Served (duplicated)", "New Households Served (unduplicated)", "Total Individuals Served (duplicated)", and "New Individuals Served (unduplicated)". Each card has a zero icon and the label "households" or "individuals".

Step #3: Click on the Create New Event Schedule button

All Event Schedules Create New Event Schedule

*Status
Active

Filter results by keyword...

Program Location ↓ Event Schedule Title One Time / Recurring Status

Step #4: Fill out the details for the event schedule

Details Service Dates Reservations Publishing

Location and Title

*Location
Select

* This is required

*Title

* This is required

In the Location field, you should have one location that corresponds to your agency location. Choose the location from the dropdown.

For the Title field, type in the same information as your location.

Address

Program location Custom address

*Address
[Redacted]

Apartment, Floor, etc.
[Redacted]

*City *State *ZIP
[Redacted] [Select] [Redacted]

County
[Redacted]

Based on what you have chosen for the Location field, the Address section will auto default to your pantry address. If you need to add a custom address, click on the Custom Address bubble and fill in the information.

Date and Time

*Date: 3/4/2025 [Calendar icon] Is Past Event

*Start Time: 12:00 AM *End Time: 11:59 PM *Time Zone: Central Time (CT) [Dropdown]

One Time Recurring

Repeat every: [Minus] 1 [Plus] *Time Frame: Day [Dropdown]

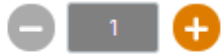
Ends: Never

On: [Date field]

For the Date and Time section, I would recommend setting the start date to an earlier date than your first event, setting the start and end time to encompass the full day, and setting the event as recurring daily, even if it is not the case. This will ensure that even if schedules change in the future or someone tries to enter information from paper forms after the time set for distribution, the program will work smoothly.

Primary Services Provided

How many primary services will be provided at this event? ?



*Primary Service Category

*Custom Display Name

* This is required

*Intake Form

Government Program

* This is required

Add Service

For the Primary Services Provided section, you will add the following information based on what services you provide. If you have multiple programs, please click the plus button to add more services. Most of our partners will use Option 1, Option 2, or both.

Option 1: You provide USDA/TEFAP food from the government.

Option 2: You provide non-USDA/TEFAP food.

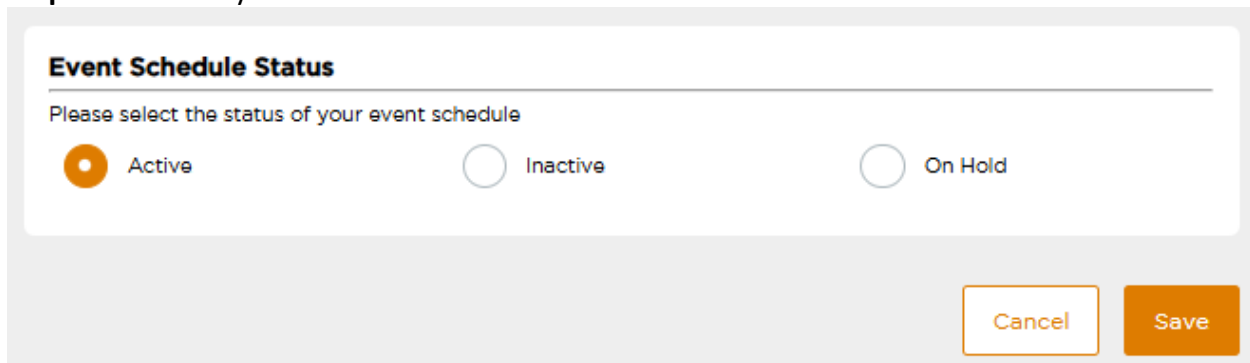
This is a common case for both our TEFAP partners and non-TEFAP partners. Even if you provide TEFAP food, if you have other food you're providing to those who are not TEFAP eligible, add this option in addition to Option 1.

Option 3: You provide other services (delivery, mobile pantry, other non-food items) and would like to track them on Service Insights.

	Option 1	Option 2	Option 3
	TEFAP specific	Donated/purchased food only	Talk with the Service Insights Project Coordinator about how you can customize.
Primary Service Category	Food Pantry	Food Pantry	
Custom Display Name	USDA	Food Pantry	
Intake Form	IL TEFAP /MO TEFAP	Minimal Food Pantry	
Government Program	The Emergency Food Assistance Program	-	

You can ignore the rest of the Event Schedule page for now, as those are relevant only for features that will be released in the future. Click on the Save button on the bottom right of the screen to move to the next page.

Step #5: Activate your event schedule

A screenshot of a web form titled "Event Schedule Status". The form has a white background with a light gray border. At the top, the title "Event Schedule Status" is followed by a horizontal line. Below the line, the text "Please select the status of your event schedule" is displayed. There are three radio button options: "Active" (with an orange filled circle), "Inactive" (with an empty white circle), and "On Hold" (with an empty white circle). At the bottom right of the form, there are two buttons: "Cancel" (a white button with an orange border) and "Save" (a solid orange button).

At the very bottom of the screen that comes up, after all the event times, you will see the Event Schedule Status section. Click on the Active bubble and click Save in the bottom right corner.