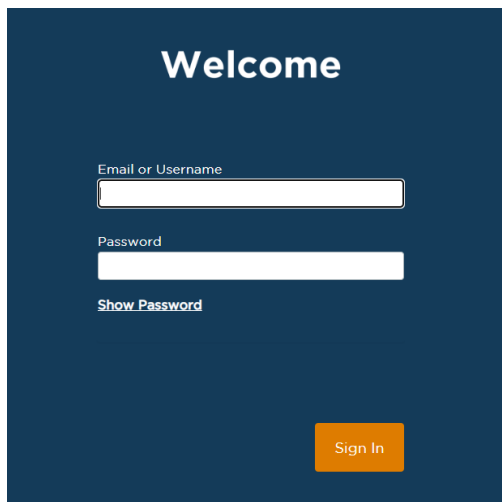


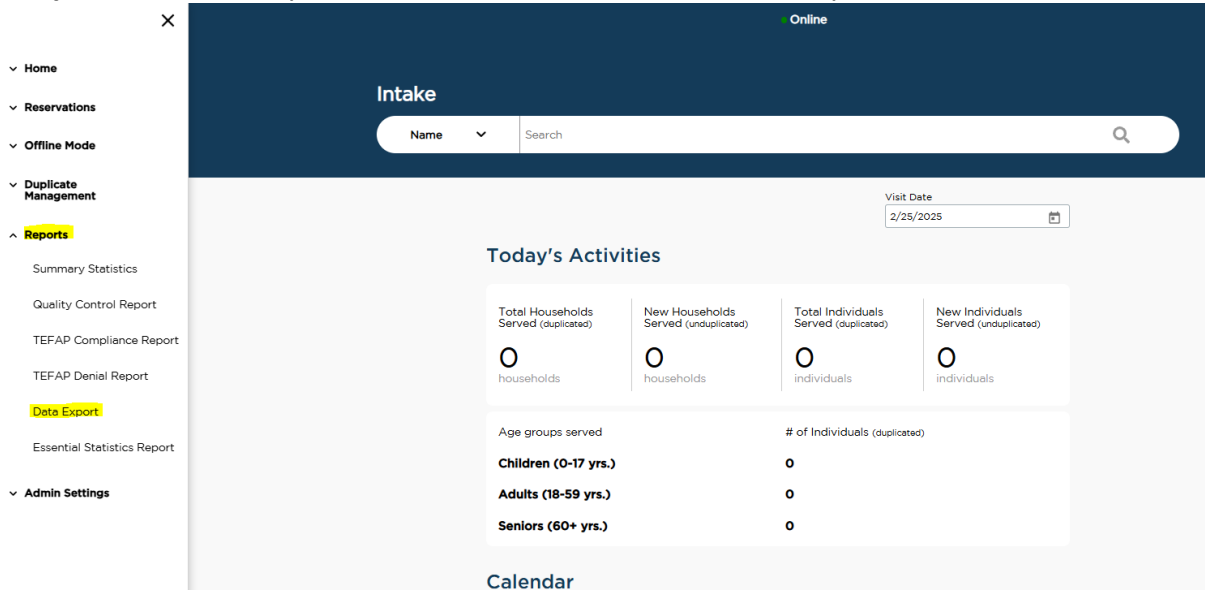
Service Insights on MealConnect (Neighbor Intake Program) **Quick Guide: Intake Data Export**

This is a quick guide to downloading neighbor intake data. To view the downloaded data, you will need Microsoft Excel. You will be able to filter the neighbor intake data by the date range you are interested in (i.e., past 30 days or just one month) before downloading. Please keep in mind that downloaded sensitive neighbor data must be kept secure, and identified data should only be used when it is necessary. After you are done using the data, please delete the file to ensure data security, since you will be able to download the same data again when it is needed.

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



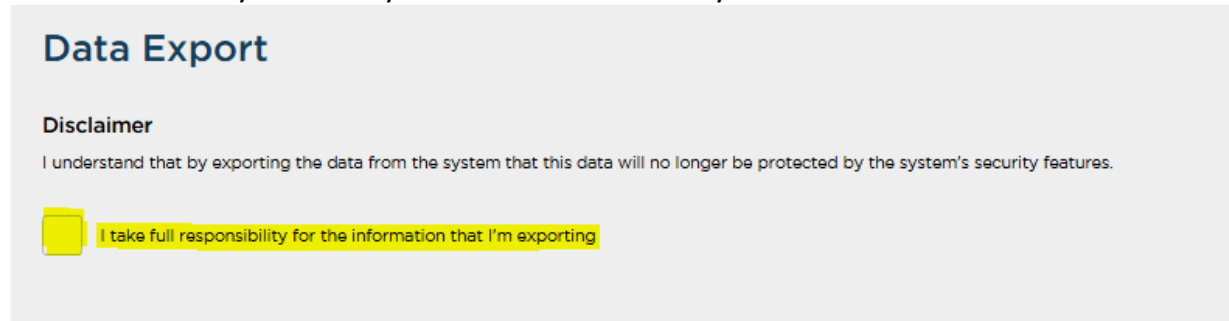
Step #2: Click the top left menu button and select “Data Export.”



Data export (4/16/2025)

Step #3: From here you will need to click the check box acknowledging the disclaimer.

- Please be careful with what information you are downloading and be mindful of who is given access to the data. Always make sure to only download data that is absolutely necessary to ensure data security.



Data Export

Disclaimer

I understand that by exporting the data from the system that this data will no longer be protected by the system's security features.

I take full responsibility for the information that I'm exporting

Step #4: Select the type of data export you want from the drop-down menu. Identified data includes all personal information (such as name, address, and contact information), while de-identified means the personal information is omitted.

- a) Household roster will have the head of household's information and then the members after. This is likely the data that you will need to check for most purposes.
- b) Neighbor Roster will have a separate line for every person in the household.
- c) The remaining reports typically aren't needed.



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*Type of Data Export

Household Roster

Step #5: Choose your agency and the visit date range that you are interested in under the Filters section. Other filters are there, if needed, but typically will not be as helpful and will limit the data that you are exporting.

The screenshot shows a 'Filters' section with the following elements:

- *Agency:** A dropdown menu with the selected value 'St. Louis Area Foodbank Wal...'.
- *Visit Date Range:** Two date pickers with calendar icons. The first is set to '1/1/2025' and the second to '1/31/2025', with 'TO' between them.
- Geography Type:** A dropdown menu with 'Select'.
- Geography Type Value:** A dropdown menu with 'Select'.
- Program Type:** A dropdown menu with 'Select'.
- Service Type:** A dropdown menu with 'Select'.
- Government Program:** A dropdown menu with 'Select'.

Step #6: Click on the orange “Run Report” button at the bottom of the screen to download the Excel spreadsheet with all the information you’ve requested.

Remember to delete the data off the computer and shred the data if it was printed as soon as possible to ensure best data safety practices with neighbor’s information.