

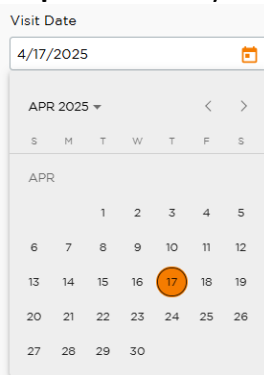
Service Insights on MealConnect (Neighbor Intake Program)

Quick Guide: Entering a Neighbor record for purchased and donated food distribution (not USDA/TEFAP)

This is a quick guide on completing neighbor intake on Service Insights for the neighbors who are **NOT receiving USDA TEFAP foods (government programs)**, meaning you only distribute purchased or donated foods. The guide will walk through the process for both a new neighbor and a returning neighbor.

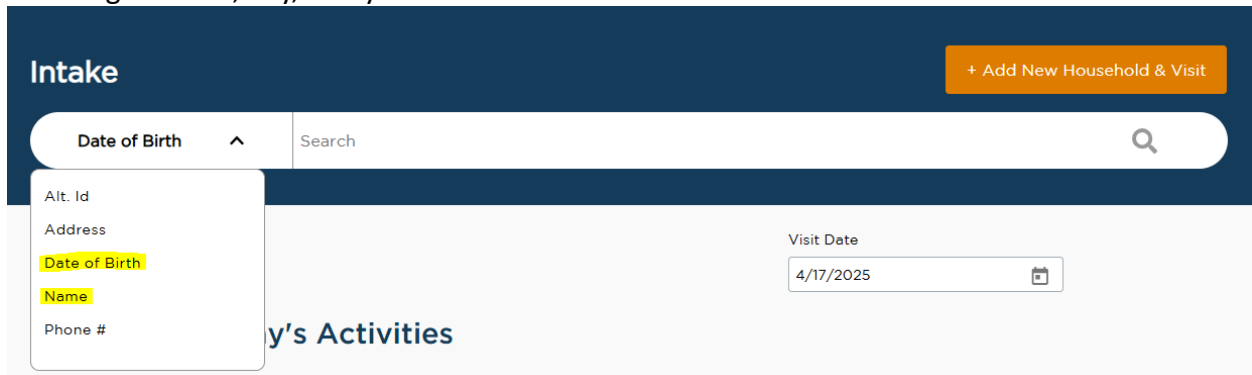
Step #0: Log into Service Insights (Neighbor Intake Program)

Step #1: Ensure you have the correct date set on the Visit Date field.



Step #2: Search for the neighbor record. Regardless of whether the neighbor has visited your agency or not, you should always start by searching for the neighbor.

Select “Date of Birth” as the search type and ask the neighbor for their birthday, and type the full 8-digit month, day, and year into the search bar.



If you're unable to find the neighbor using that method, search by their name. Ensure that the search type on the left of the search bar has been set to “Name.” When searching by name, use the first three letters of the first name and the first three letters of the last name to ensure that you are accounting for any typos that may have been entered in previously. Confirm you have the correct neighbor record by checking the name, address, date of birth, and household member count.

Contact ^

*Address No fixed address ?

* This is required

Apartment, Floor, etc.

*City *State *ZIP

* This is required * This is required * This is required

*County

* This is required

In the Contact section, add the address of the neighbor or as much as the neighbor is willing to provide. Try to get at least the City, State, Zip, and County. If the neighbor is unhoused or has no permanent address, click the “No fixed address” box in the top right corner and it will auto fill the agency address.

Email Address Ok to contact ?

*Phone # Ok to contact ? No phone

* This is required

What method of communication do you prefer?

Text Call Email

Add a phone number and an email address for the neighbor. Although the phone number field is required, if the neighbor has no phone, click the “No phone” checkbox on the right. If the neighbor provides their phone number and says it’s okay to contact them, the system will send them a text message with a QR code and Alt ID that can be used for future intake.

Step #6: Add Demographic information.

Gender Identity ^

*What gender do you identify as? ?

* This is required

Male Female Transgender

Non-binary Gender non-conforming None of these

Don't Know / Prefer not to answer

This section asks for gender identity. Ask the neighbor the question that is shown (“What gender do you identify as?”). This field is required, but if the neighbor does not know or does not feel comfortable disclosing this information, you can mark “Don’t Know/Prefer not to answer.” **Under no circumstances should someone assume a neighbor’s gender identity.** If you do not feel comfortable asking, click the “Don’t Know” bubble at the bottom.

Race / Ethnicity ^

*What race or ethnicity do you identify as? ?

* This is required

White Hispanic, Latino, or Spanish Black or African American

Asian American Indian or Alaska Native Middle Eastern or North African

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

The second section asks for race/ethnicity. Ask the neighbor the question that is shown (“What race or ethnicity do you identify as?”). This field is required, but if the neighbor does not know or does not feel comfortable disclosing this information, you can mark “Don’t Know/Prefer not to answer.” **Under no circumstances should someone assume a neighbor’s race and/or ethnicity.** If you do not feel comfortable asking, click the “Don’t Know” box.

Step #8: Add government program information.

SNAP Benefits ^

*Is anyone in your household currently receiving SNAP or food stamps or food stamps? ?

* This is required

Yes No Don't know / Prefer not to answer

The following section asks if anyone in the household is receiving SNAP (Supplemental Nutrition Assistance Program). Choose Yes even if just one member of the household receives it.

Other Government Programs ^

Does anyone in your household currently receive benefits through the following government programs? ?

<input type="checkbox"/> Children's Health Insurance Program (CHIP) ?	<input type="checkbox"/> Commodity Supplemental Feeding Program ?	<input type="checkbox"/> Free/reduced price school meals ?
<input type="checkbox"/> Headstart	<input type="checkbox"/> Housing subsidies ?	<input type="checkbox"/> Low Income Home Energy Assistance Program (LIHEAP) ?
<input type="checkbox"/> Medicaid ?	<input type="checkbox"/> Medicare ?	<input type="checkbox"/> Public Housing
<input type="checkbox"/> Social Security ?	<input type="checkbox"/> Social Security Disability Insurance (SSDI) or disability payments ?	<input type="checkbox"/> Supplemental Security Income (SSI) ?
<input type="checkbox"/> TANF or cash assistance ?	<input type="checkbox"/> Unemployment ?	<input type="checkbox"/> Veteran's Assistance ?
<input type="checkbox"/> Women, Infants, and Children (WIC) ?	<input type="checkbox"/> None	<input type="checkbox"/> Don't know / Prefer not to answer

If your form includes a section called Other Government Programs, fill it out as best as you can to help inform public assistance outreach programs.

Household Monthly Income ^

Which category represents the total income of all members of your household in a typical month? ?

- | | | |
|---|---|---|
| <input type="radio"/> Zero | <input type="radio"/> Less than \$500 | <input type="radio"/> \$500 - \$999 |
| <input type="radio"/> \$1,000 - \$1,999 | <input type="radio"/> \$2,000 - \$2,999 | <input type="radio"/> \$3,000 - \$3,999 |
| <input type="radio"/> \$4,000 or more | <input type="radio"/> Don't know / Prefer not to answer | |

This is an optional field for Household Monthly income that you can collect if it's necessary for your eligibility process.

Step #9: Fill in Additional Notes section, if needed.

Additional ^

Additional Notes ?

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

For the Additional Notes section, feel free to add any information that you want to keep in their records that will be helpful. This will be viewable by others in your agency who have access to Service Insights on MealConnect (Neighbor Intake Program).

Step #10: Save and continue to the next page.

Click "Save and Continue" button on the bottom right side of your screen when you're ready.

Step #11: Finish Intake

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Add New Household

✓ Eligibility ✓ Signature ✓ Household Info 4 Finish Visit

Primary Service Provided

Food Pantry

Pounds Pieces Dollars Meals

Description

The final page finishes the visit. There is a section to note how much and what the neighbor has received. Unless this section is meaningful to your agency, there is no need to fill it out.

When you're ready, click the Finish button at the bottom of the screen.