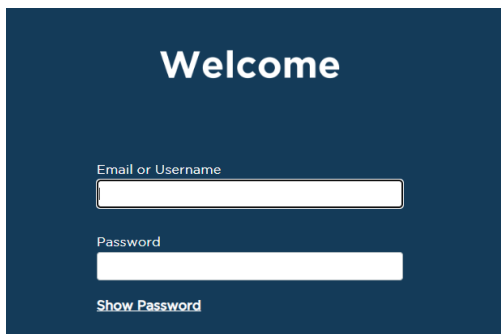


Service Insights on MealConnect (Neighbor Intake Program) **Quick Guide: Reservation and check-in**

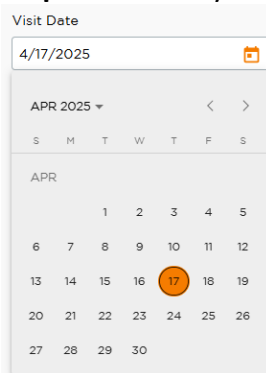
This is a quick guide on adding a reservation for the neighbor visit and checking those neighbors in with or without a reservation. This is only relevant for those partner agencies who has requested the reservation function and have it activated for their agency on Service Insights. If you do not take a reservation, please check out the other intake guides, and if you would like to add the reservation function, please let the foodbank admin know. We will go over the reservation part of the process, followed by the intake process.

Taking a reservation

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



Step #2: Ensure you have the correct date set on the Visit Date field.




Step #3: Click on the “Check-In List” button in the Distribution Events Today section.

Distribution Events Today

Event	Time	Distributions
Training Agency	12:00 AM - 11:59 PM	0 served
Training Agency Reservation Test	8:00 AM - 3:00 PM	0 served / 0 reservations (12 capacity)
Training Agency IL TEFAP	12:00 AM - 11:59 PM	0 served

[Don't see the event you need? + Add New](#)



Step #4: Click on the Neighbor Search tab.

Event Reservations **Neighbor Search** Recently Served

Visit Date
4/23/2025

[Export to excel](#) [+ Add New Household & Reservation](#)

Filter results by keyword...

Date/Time	Name	Active Household Members	Phone	Services	Status
No data available in table					

Step #5: 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.

Search Results

Please enter a search term.

[+ Add New Household & Visit](#) [+ Add New Household & Reservation](#)

Name ^ Search

- Alt. Id
- Address
- Date of Birth**
- Name**
- Phone #

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.

Step #6a: If you found the correct neighbor record, you can click on the “Reserve” button on the right side of their name. Ensure the record is the right one by looking at the address, household member count, phone number, and DOB.

Search Results
2 results for "jas do"

+ Add New Household & Visit + Add New Household & Reservation

Name jas do

Name	Active Household Members	Last Visit	Phone	DOB
Jason Doe 70 Corporate Woods Dr Bridgeton, MO 63044	2	N/A	N/A	5/5/1958

Buttons: Add Visit, **Reserve**

Step #6b: If you are unable to find the correct neighbor record, click on the “Add New Household & Reservation” button at the top.

Search Results
2 results for "jas do"

+ Add New Household & Visit **+ Add New Household & Reservation**

Step #7: Choose the correct service and the time slot on the pop-up window and click “Next.” For an existing neighbor record, this is all you need to do for making a reservation.

Which primary service do you want to add this reservation?

Please select all that apply for the event on 4/23/2025

Training Agency Reservation Test

8:00 AM - 3:00 PM

Food Pantry

*Time Slot

10:15 AM - 10:30 AM

Next

Step #8: Add Basic information.

Basic Information


First Name <input type="text"/> <small> This is required</small>	Middle Name (Initial) <input type="text"/>	*Last Name <input type="text"/> <small>* This is required</small>
Suffix <input type="text" value="Select"/>	<input type="checkbox"/> Anonymous	
Date of Birth <input type="text" value=""/> <small> This is required</small>	OR	*Age <input type="text" value=""/> <small>* This is required</small>


Ask the neighbor and input the first and last names into the correct fields. Ask if the neighbor is willing to provide their date of birth; if they are unwilling, ask for their age. If you input their age, the system will automatically set their date of birth to January 1st of the appropriate year to match the age.

Contact

Address <input type="text"/> <small> This is required</small>	<input type="checkbox"/> No fixed address ?	
Apartment, Floor, etc. <input type="text"/>		
City <input type="text"/> <small> This is required</small>	*State <input type="text" value="Select"/> <small>* This is required</small>	*ZIP <input type="text"/> <small>* This is required</small>
County <input type="text"/> <small> This is required</small>		

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 #9: Add Demographic information.

Gender Identity 

* 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 #10: Add Household information.

Household ^

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

Adults (18-59 yrs.)	Children (0-17 yrs.)	Seniors (60+ yrs.)
<input type="button" value="-"/> <input style="width: 40px; text-align: center;" type="text" value="0"/> <input type="button" value="+"/>	<input type="button" value="-"/> <input style="width: 40px; text-align: center;" type="text" value="0"/> <input type="button" value="+"/>	<input type="button" value="-"/> <input style="width: 40px; text-align: center;" type="text" value="0"/> <input type="button" value="+"/>

The following section asks for the number of household members of the neighbor, excluding themselves. Use the plus sign to add as many household members as the neighbor indicates.

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

Adults (18-59 yrs.)	Children (0-17 yrs.)	Seniors (60+ yrs.)
<input type="button" value="-"/> <input style="width: 40px; text-align: center;" type="text" value="1"/> <input type="button" value="+"/>	<input type="button" value="-"/> <input style="width: 40px; text-align: center;" type="text" value="1"/> <input type="button" value="+"/>	<input type="button" value="-"/> <input style="width: 40px; text-align: center;" type="text" value="0"/> <input type="button" value="+"/>

Adults

[Remove #1](#)

*Status ?

Active

*First Name Middle Name (Initial) *Last Name

Suffix

*Date of Birth OR *Age

* This is required * This is required

[Additional Info](#)

If the neighbor feels comfortable disclosing their household members, delete the default names (such as “Adult 1”) and enter the First (last name should autofill from the head of the household’s name) of each member of the household. Add Date of Birth OR Age for each member of the household.

Request the neighbor if we can ask for a few additional questions about their household member to help us (food bank and the food pantries) improve our services and help us with funding and advocacy efforts. If the neighbor is willing to provide additional info, click on the additional info button to add gender and race information for each of the household members.

Step #11: 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? ?

Zero Less than \$500 \$500 - \$999

\$1,000 - \$1,999 \$2,000 - \$2,999 \$3,000 - \$3,999

\$4,000 or more 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).

When you're ready, click on the "Finish" button at the bottom of the page. If you don't get all the information during the reservation, you can always ask the questions at the time of intake.

Checking-in neighbors

Steps #1-3: These steps will be exactly same as above.

Step #4: If you see the neighbor's record on the reservation page, click on the "Check-In" box next to their name.

[Event Reservations](#) [Neighbor Search](#) [Recently Served](#)

Visit Date: 4/23/2025 📅 [Export to excel](#) + Add New Household & Reservation

Filter results by keyword... 🔍

Date/Time	Name	Active Household Members	Phone	Services	Status
4/23/2025 10:15 AM - 10:30 AM	Jason Doe	2	N/A	Food Pantry	Edit Check-In

If not, go to the Neighbor Search tab, search for the neighbor’s record and if it does not exist, you’ll click on the “Add New Household & Visit” and follow the steps above for making a reservation.

Step #5: Confirm that the information on the pop-up window is accurate and click on the “Next” button.

Step #6: Confirm all the information you have on the neighbor’s household is accurate and if anything is missing, ask if the neighbor wants to provide the information and fill in the blanks.

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 #7: Click on the “Save and Continue” button at the bottom of the page to navigate to the next page.

Step #8: Finish Intake.

The screenshot shows the 'Add New Household' form at the 'Finish Visit' step. The progress bar at the top indicates four steps: Eligibility, Signature, Household Info, and Finish Visit (which is circled in blue). The main form area is titled 'Primary Service Provided' and includes a checked checkbox for 'Food Pantry'. Below this are four input fields labeled 'Pounds', 'Pieces', 'Dollars', and 'Meals'. At the bottom of this section is a large text area labeled '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.