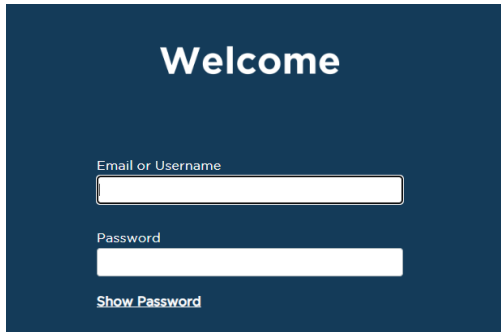


Service Insights on MealConnect (Neighbor Intake Program) **Quick Guide: Creating User Accounts and Account Management**

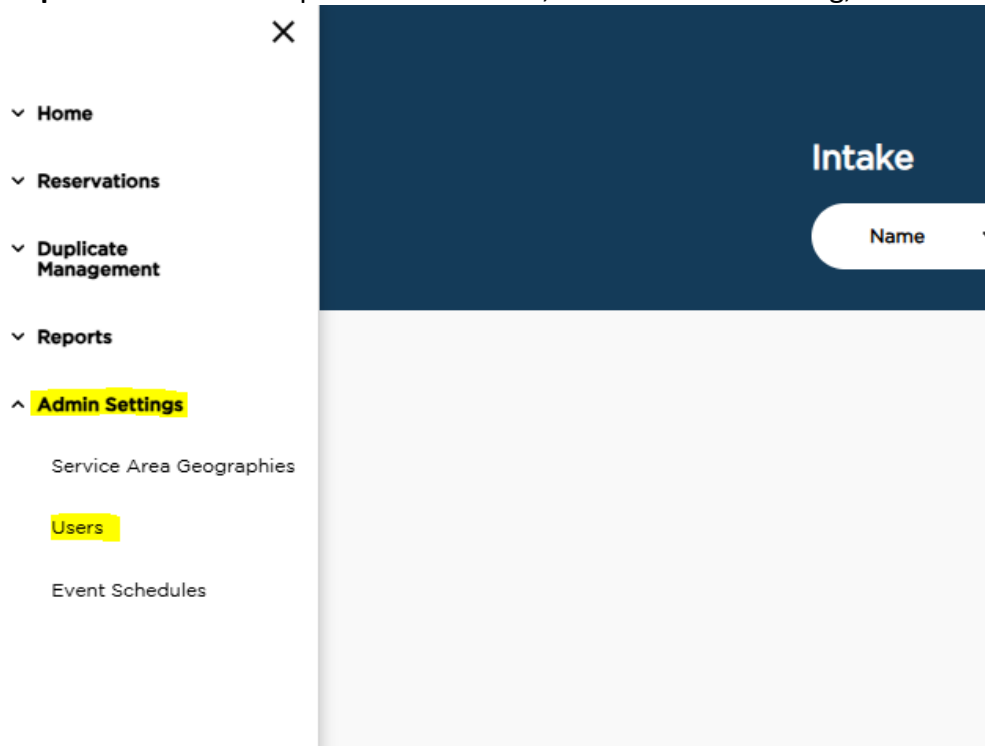
This is a quick guide on creating User Accounts for your agency on Service Insights. You should already have access to one Admin Account created by us. The best practice would be to create a new user account for each volunteer/staff member using their email for each person who will be doing neighbor intake. Do not share your admin account information with others. At the end of this guide, we will also go over how to change a user account password and how to inactivate a user account. This is very important in keeping neighbor's information safe.

Creating a new user account

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



Step #2: Click on the top left menu button, click on Admin Setting, and select "Users"



Step #3: Click on Create New User

All Users [Export to excel](#) [Create New User](#)

*Status
Active

Filter results by keyword...

Name	Job Title	User Type	Shared Login	Status
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Step #4: Fill in User Info section

Enter the First and Last name and Job title for the staff/volunteer.

User Info

*First Name

*Last Name

*Job Title

Phone #

Step #5: Fill in the login information section

a No email address

b Shared login

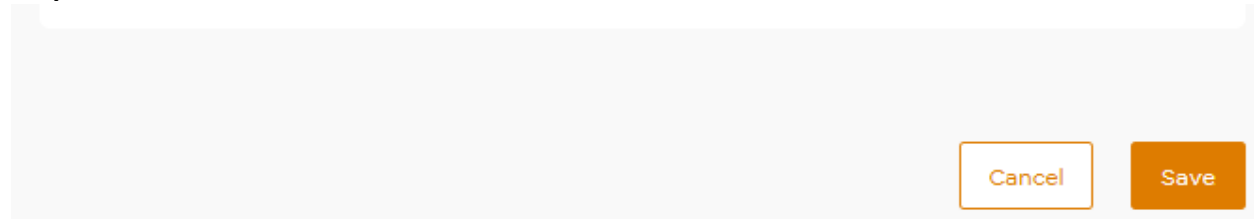
c Shared login

Please select the status of the user

d Inactive Active

- a. **User Name:** Input the email address for the volunteer/staff. If creating a shared account.
- b. **Password:** Choose a password that is easy to remember and that you can give to each intake staff/volunteer. If people forget their password, you can change it again in the future, or they can use forgot my password function using their email address.
- c. **Organization:** Choose your agency from the dropdown menu.
User Type: Choose according to the options below.
 - 1. **Agency User:** Can do intake, manage duplicates, pull deidentified neighbor reports, and see Tableau dashboards. I'd recommend this option for most cases.
 - 2. **Agency Viewer:** Can only view Tableau dashboards. This is an option if you have someone who only needs Tableau dashboards for grant writing.
 - 3. **Intake User:** Can only do intake, but cannot see past data. This should rarely be used.
- d. **Status of the user:** Set it to Active by clicking on the bubble.

Step #6: Save the account



A screenshot of a form interface. At the bottom right corner, there are two buttons: a white button with an orange border labeled "Cancel" and a solid orange button labeled "Save".

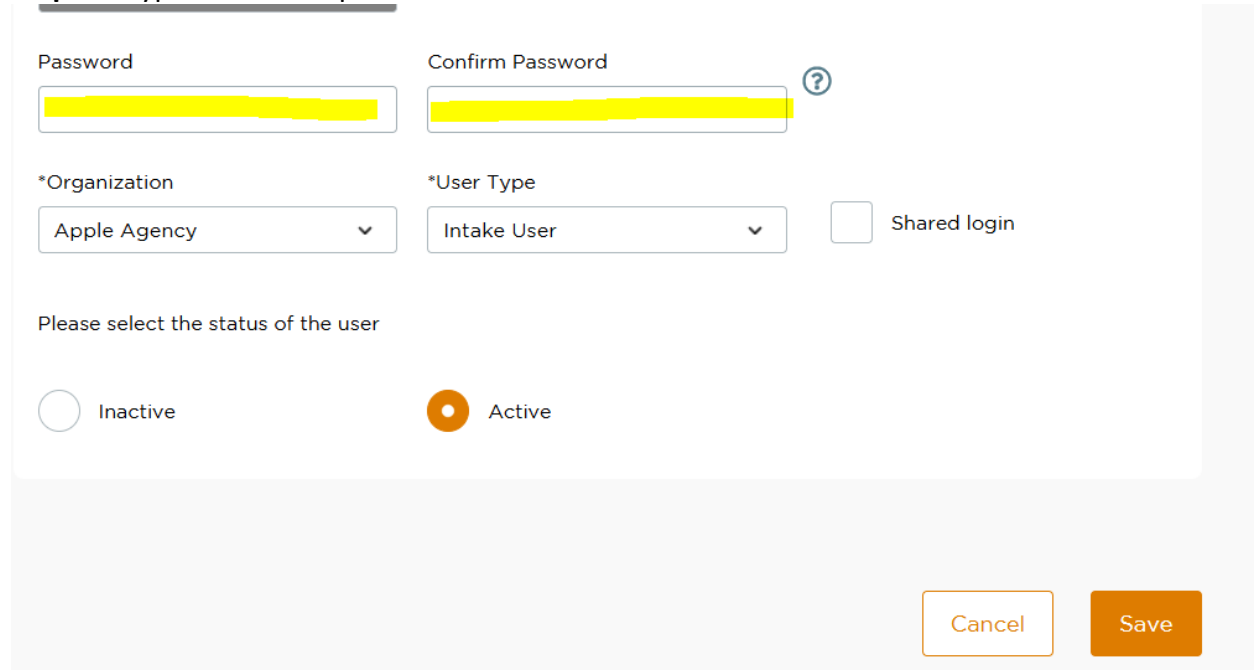
Ensure you have the correct User Name and Password to be able to share with the staff/volunteers who will be using the account. Click the Save button at the bottom right corner to save the User Account.

Changing a password

Step #1: Go to the All Users page on Admin Settings by looking at **Step #2** of Page 1 of this document.

Step #2: Click on the user's name, which requires a password change

Step #3: Type in the new password in the Password field



A screenshot of a user account form. It contains the following elements:

- Two text input fields: "Password" and "Confirm Password". Both fields are filled with yellow text.
- A dropdown menu for "*Organization" with "Apple Agency" selected.
- A dropdown menu for "*User Type" with "Intake User" selected.
- A checkbox labeled "Shared login" which is currently unchecked.
- A section titled "Please select the status of the user" with two radio button options: "Inactive" (which is unselected) and "Active" (which is selected).

At the bottom right corner, there are two buttons: a white button with an orange border labeled "Cancel" and a solid orange button labeled "Save".

Step #4: Click on the Save button at the bottom right corner

Inactivating a User Account

This is very important to do for any intake staff/volunteer who is no longer at your agency to protect the neighbor's information.

Step #1: Go to the All Users page on Admin Settings by looking at **Step #2** of Page 1 of this document

Step #2: Click on the Name of the user whose account must be inactivated

Step #3: Click on the Inactive bubble at the bottom and click on the Save button

Please select the status of the user

Inactive Active

Cancel Save

