

## Before You Start Intake on Service Insights!

Please read this entire document before you begin using Service Insights. By reviewing these tips we can avoid common errors that we have noticed when using the system.

### 1. Use your unique login

Please use YOUR assigned login when available. If you do not have one, contact your Pantry Director / Supervisor. Users can be added in Admin Settings > Users.

### 2. Enter visits on the correct date

Before adding a visit make sure the date is correct.



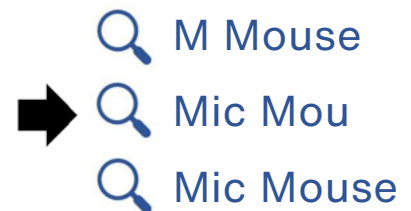
Visit Date  
1/9/2023  
This date is in the past.

### 3. Search before adding a new household

Search if the person already exists in the system. **They may have already visited another partner agency and could be in the system!**

### 4. Search tips

Don't search by full name! We recommend searching by Date of Birth (use 8 digits MDY) or look up a partial name to widen your search and account for misspellings. **For example, instead of Mickey Mouse, try searching:**



### 5. Add only OTHER household members in the household Section

Do not add the Head of Household again in the Household Section. When adding a household member's name delete the default prefix ("Member 1" or "Adult 1") first.

### 6. Add race & gender for each person

Race and Gender are hidden in the "Additional Info" dropdown. Ask the neighbor for the information rather than assuming.



Suffix Select \*Date of Birth 11/5/1979  
Additional Info

### 7. Someone you don't recognize in the household?

Mark household members that you do not recognize **"Inactive"**. Check for inactive people before adding a new person to household.



Status Inactive  
\*First Name Amy

## 8. Neighbor does not want to answer the question?

You can leave optional questions blank. You do not need to mark “Don’t Know /Prefer Not to Answer” for each question. The required SNAP / Food Stamps question is the only question you will indicate “Don’t Know” if the Neighbor has not answered that question.

## 9. Made a mistake?

Wrong date? Wrong Household Count? Something else?

You can delete a visit in “Visit History.” **Remember to re-add the visit with the correct information afterwards!**

Alternatively, you can click on View Household Info to correct household information without adding a visit. **Remember to click “Save” before moving away from the page!**



**Mickey Mouse**  
12344 Olive Blvd  
Creve Coeur, MO  
63141

2      N/A      N/A      10/10/1990      [Add Visit](#)

Alt ID # <b>AS110068</b>	Household Members <b>Fred Mouse</b>	Proxy <b>N/A</b>
Preferred Language <b>N/A</b>	TEFAP Status <b>ELIGIBLE</b> [7/1/2025 Recertification date]	Notes <b>N/A</b>
<a href="#">View Household Info</a>	Last TEFAP Visit <b>N/A</b>	

Mark as duplicate      [Reserve For Future Event](#)

Recent Visit History      [View History](#)

## 11. Questions? Need Help?

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