



1. Add a new neighbor

- a. If you're working an event that takes **reservations**, click the **Check-In List** button to quickly add neighbors who made a reservation. Once you've selected the correct name, skip to step e.
- b. **SEARCH FIRST:**
 - i. By **alt. ID**: if they have a barcode or QR code, you can scan it here. If they know their ID number, enter it here.
 - ii. By **address**: enter as much of the address as you know (house # required).
 - iii. By **date of birth**: enter complete birthdate in mm/dd/yyyy format.
 - iv. By **name**: use partial names to search for the neighbor in the system, even if they are new to your location. (e.g. "vin van" for Vincent Van Gogh).
 - v. By **phone number**: enter either the complete phone number or the last 4 digits.
- c. **If NOT new**: click orange **Add Visit** box, and choose the type of service being provided today.
- d. **If NEW**: Click orange **+ Add New Household & Visit** box, and choose the type of service being provided today.
- e. Enter **all required information**.
 - i. **IMPORTANT**: click **Additional Info** dropdown to add gender & race/ethnicity information for household members.
 - ii. Ignore collapsed sections, since some questions are set up to be asked on later visits. You do not need to open the collapsed sections or put in any responses.
 - iii. For returning neighbors, ask: "Has any of your information changed?" (See prompt at the top of the screen).
- f. Print new card, if needed, or scan a barcode (e.g. driver's license, grocery store card, or agency specific bar codes) to connect this household to it. This is optional. Click the "Need to resend neighbor card?" box to resend an email with the QR code to the neighbor.

2. Update household information

To **change** or **add** information about a household:

- a. Search by alt. ID (or scan barcode), address, date of birth, name or phone number.
- b. Click the + sign next to the name to view current information.
- c. Click **View Household Info** to open the record and make any necessary changes, e.g.:
 - i. Change or add information about household members (click **Additional Info** dropdown to add gender & race/ethnicity)
 - ii. Change household members' status to Active, Inactive, or Permanently Inactive if someone has moved out of the home or back in
 - iii. Change or add information about any of the other questions or add a note.
 - iv. Click **Save** to save your changes.

3. Manage duplicates

If you suspect an entry is a **duplicate**:

- a. Search by alt. ID (or scan barcode), address, date of birth, name or phone number.
- b. Verify that the names, addresses, phone numbers and birthdates all match.
- c. Click the + sign next to one of the names to view current information. If you know one of the entries is inaccurate, choose that one.
- d. Click the "Mark as duplicate" box.

4. Add a reservation

To make a reservation for a neighbor for a **future event**:

- a. Search by alt. ID (or scan barcode), address, date of birth, name or phone number.
- b. Click the + sign next to the name to view current information.
- c. Click **Reserve For Future Event**. This will only work for events that are set to accept reservations. See your agency administrator if you need this changed.

5. Offline mode

If you are using your device for neighbor intake **without an internet connection**, you can still serve both new and returning neighbors as usual. Your device should already have been prepared with a **Plan**. If your administrator has not added a plan, you will need to add all neighbors as new and sort out duplicates later.

a. **While still online:**

- i. Go to Offline Mode in the menu and choose **Plans**.
- ii. Choose the Plans you will be working with while offline (can be multiple days) and click **Load Plan to Device**. This loads existing neighbor records so you don't have to add everyone as new.
- iii. Go to Offline Mode in the menu bar and set your device to **Offline Mode**.

b. **While you are offline:**

You should now be able to add new visits as usual, but there are a few things you should know:

- i. Google API for addresses will not work offline. You will need to complete all fields manually.
- ii. Duplicate detection will not work offline. Duplicated records will need to be processed once the device is online again.
- iii. Household Profile will not be available in offline mode.
- iv. Text messages or emails will not be sent to neighbors after processing.
- v. The count under "Today's Activities" will only reflect activity on that specific device until the device returns to online mode and completes the reconcile step.

c. **When the distribution is over, and you are back online:**

- i. Go to Offline Mode in the menu and choose **Upload Data**.
- ii. Your agency administrator will later **Reconcile Data** to make sure your data is accurate.

6. Add an Event

Only your agency administrator can add different types of events, but if you find that you're running an event that's not in the system, you can add it.

- a. Click **Don't see the event you need? + Add New**.
- b. Choose the type of event you're adding. If you don't see the option you want, talk to your agency administrator; they will need to add a new kind of event.
- c. Update dates and start/end times.
- d. Click **Save** to save your changes.
- e. You should now be able to add new visits to your event.

IMPORTANT: Data Confidentiality

Please remember that you have agreed to keep our neighbors' data confidential and to protect their privacy. This means that you may not share or discuss anything you have learned about a neighbor during intake with **anyone**. If you have questions or concerns, please discuss these with your supervisor or agency administrator.