Service Insights on MealConnect
User Manual – Agency Users

Last Updated March 1, 2023

Updates include:

- Updated Food Bank Admin Settings section to reflect new administration sections: Service Area Geographies and Event Schedules

Contents

WELCOME

ABOUT US

Feeding America

Feeding America, a non-profit organization, is the nation's largest domestic hunger-relief organization—a powerful and efficient network of 200 food banks across the country. Our mission is to advance change in America by ensuring equitable access to nutritious food for all in partnership with food banks, policymakers, supporters, and the communities we serve. For more information about Feeding America, visit us at www.feedingamerica.org.

The Service Insights Initiative

The Service Insights Initiative is a network-wide approach to electronically collect consistent data from the people we serve at partner agencies and food banks across the country. Collecting this data electronically using cloud-based solutions, like this Service Insights on MealConnect platform, will enable Feeding America, food banks, and partner agencies to view data in real-time, providing valuable insights at a local, regional, state, and national level. Over time, these insights will help us understand how to better serve and meet the needs of all our neighbors across the country.

Service Insights on MealConnect Platform

It starts with gathering data that will be kept confidential and secure. Partner agencies collect and enter neighbors' basic household and demographic information during intake. Food banks and agencies can subsequently glean timely, actionable insights to holistically address the needs of neighbors. Our future vision is that neighbors will be able to use the platform to find and access local resources, including making a reservation or appointment at a partner agency.

Food banks get real-time data about the people they serve to make data-driven decisions and respond to emerging needs—all at no cost. Agencies get deeper insights to adapt and improve services, all while saving time on reporting and compliance. As a network, we will collectively harness nationwide insights to improve program delivery, drive national and local policy change, and advance toward our shared outcomes.

Through an expanded national partnership with the Tableau Foundation, we will be able to provide all food bank and agency users with seamless, real-time access to their data through interactive, best-in-class data visualizations - democratizing data across the country.

This platform is the result of decades of collective experience and learning to improve, build, and implement a solution that meets the vast array of needs amongst food banks and agencies across the country. We will continue to improve and enhance the platform over time based on network needs.

Ethical Data Collection

Collecting Sensitive Information

Coming soon!

Data Sharing with Third Parties

Coming soon!

User Confidentiality Agreements

In order to protect neighbors and their personal data, food bank administrators are encouraged to collect signed User Confidentiality Agreements from all users, including other food bank users and agency users. Although it is not legally binding, the purpose of this agreement is to commit an individual user to keep neighbors' personal data confidential.

By executing this agreement with all software users, food banks can strive to ensure that any person who encounters the data can also be held responsible for protecting its security. For example, different teams at the food bank beyond the primary project team may end up accessing data, such as fundraising or communications staff. At the agency level, both agency directors and individual volunteers conducting intake may be using the software. While the agreement cannot prevent data from being disclosed, it can help raise awareness of the need to keep information confidential and encourage users to abide by the agreement.

HIPAA

Food banks across the country partner with local health care providers and payers to ensure that neighbors and patients with health concerns have access to healthy, nutritious foods. However, these collaborations between food banks and health care often require communication about the needs of patients and neighbors served. With more communication between food banks and the health care system comes increased responsibility to think critically about how information that relates to patients and neighbors is shared and protected.

Health care providers and payers are legally required to keep patient information private and secure. Federal legal obligations have been embodied in federal law through HIPAA, the Health Insurance Portability and Accountability Act of 1996. However, a food bank generally does not meet the legal definition of an organization subject to HIPAA (i.e., a Covered Entity or Business Associate). In other words, a food bank is not generally subject to HIPAA based on the provision of food, general nutrition education, gathering self-reported information from neighbors, and related activities.

For more information about HIPAA or food bank/health care partnerships, please review *Food Banks as Partners in Health Promotion: Navigating HIPAA* visit the United States Department of Health and Human Services (HHS) website, and/or consult an attorney.

Cultural competency

This platform has been developed and will continue to be enhanced with our neighbors, local communities, and cultural competency in mind. However, providing food bank and agency users with specific training around cultural competency and customer service is also critical to ensuring a secure and dignified intake experience for all neighbors. Ideas for incorporating these types of trainings can be found here in the Train & Onboard Phase of the Service Insights Network Framework.

CONTACT & TECHNICAL SUPPORT

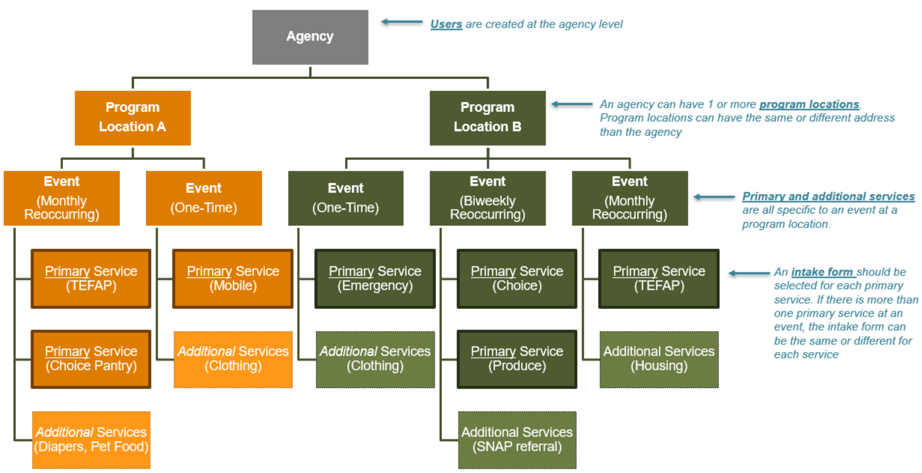
If you have technical issues or need support, please contact your agency or food bank administrator. If the issue cannot be resolved, please contact Support at faserviceinsights@feedingamerica.org.

Getting Started

To quickly get up and running so that you and your team can begin using the Service Insights on MealConnect platform, here are the key things you'll need to know.

Organizational Structure

The Service Insights on MealConnect platform is organized in the following way: Each food bank will have multiple agencies. Each agency can have one or more Program Locations. The Program Locations are where Events (i.e., food distributions) take place, and each Event can offer one or more Services. Services are broken down into two overarching categories, Primary Services (i.e., often a grocery distribution or regulated service, such as TEFAP) and Additional Services (i.e., often non-regulated or non-food services). The visual below includes an example of this hierarchy.



Key terms

Below are some of the key terms used throughout the platform.

Agency: An agency is a partner with whom your food bank works to serve neighbors. An agency may have one or more program locations.

Event: An event is single a distribution within an event schedule. It will always be tied to a specific date.

Event Schedule: An event schedule is the recurrence of a distribution at a specific program location. This can be a one-time event schedule such as November 23 or it can be a recurring pattern such as the third Thursday of each month.

Household: A household is made up of all neighbors living in a housing unit who will benefit from the services provided at a visit. A household can be one or more neighbors and excludes group homes and shelters. Profiles are set up at the household level in the system.

Intake Form: Intake forms establish the number and type of intake questions asked at each event as well as which, if any, regulatory signature is captured.

MyMealConnect.Org: The public (neighbor) facing locator and reservation tool.

Neighbor: A neighbor is anyone receiving services during an event. One or more neighbors make up a household. All neighbors are set up with a household profile in the system.

Program Location: A program location is a specific program or distribution site operated by an agency. Program locations can have the same or a different address as the agency or each other.

Service: Services are the categories of food and other assistance being provided to households at an event. Services are divided into *primary services* and *additional services*.

> Primary service: The main food or assistance provided to households at a program location during an event. Intake forms can be configured to support different types of primary services.
>
> Additional service: Any additional resources or assistance provided to households at a program location during an event. These are often non-regulated or non-food related services that are supplemental to the primary service being offered.

Service Area Geographies: Services Area Geographies tell a neighbor if they are allowed to attend an event based on the neighbor's zip code.

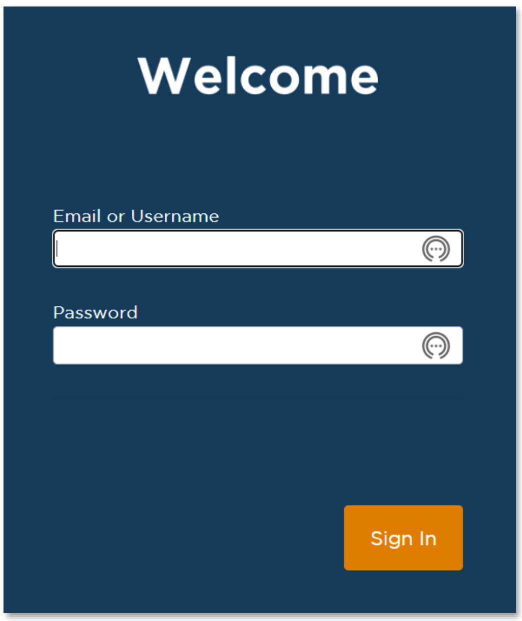
User: A user is someone with the ability to log into the system and perform various tasks.

Visit: A visit is recorded any time a household is served at an event. Multiple primary and secondary services can be provided to a household during a visit. All active members of the household are recorded as benefiting from that visit.

Logging In

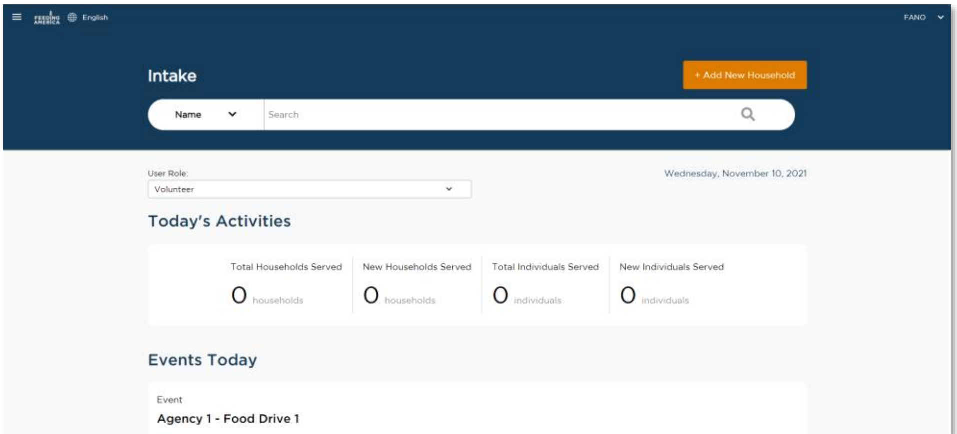
To log in to the training site, go to training.neighborintake.org. To log into the live site, go to network.neighborintake.org. Enter your **Email** address or **Username** and **Password** assigned by your administrator. Click **Sign In**.

Note: this is a temporary domain name pending the final name of the platform.



Home Screen

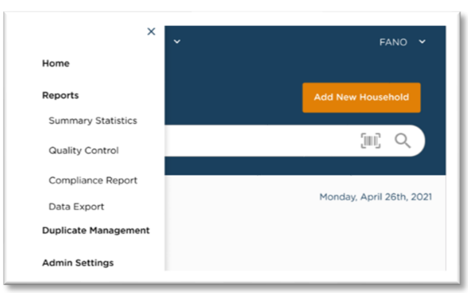
Once you log in, you will be taken to a home screen with a snapshot of recent activity. This is also where you will begin intake during an event.



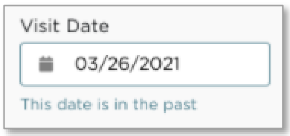
The home screen displays:

- **Today's Activity** broken out by the same categories as above for food bank users
- **Events Today** occurring across your program location(s) with details about reservations
- **Services Offered Today** broken out by Primary Services and Additional Services, occurring across your program location(s)
- A **Calendar** that allows you to compare daily service trends from across your program location(s). You can use the backward and forward arrows to view different days. *Note: the calendar will not be visible to Intake Users accounts.*

The home screen also contains the Search bar, Add A New Household button, and access to **Administrative Settings** and **Reports** by clicking on the hamburger menu on the top left.



The **Visit Date** is also on the top right above Today's Activity. This date should always be the current date, unless you are recording a back-dated visit (see Add a Back-Dated Visit section), in which case you will see this notification:



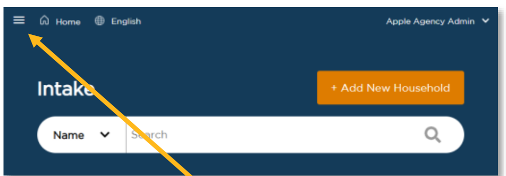
If at any point you'd like to return to the **Home Screen**, click on the Feeding America logo on the top left.

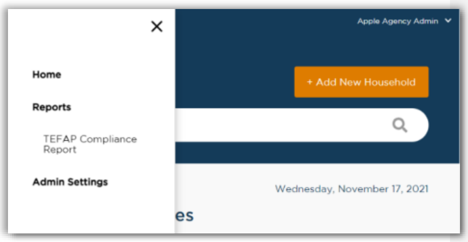
Logging Out

To log out, click on the dropdown arrow next to your username at the top right of the screen. Click **Logout**.

Agency Admin Settings

Admin Settings are where agency admin users can customize a limited set of optional intake answer options, create new users, and schedule events (distributions). From the home screen, Admin Settings are located in the Menu on the top left.





Click the Menu here to access Admin Settings.

Service Area Geographies

Services Area Geographies tell a neighbor if they are allowed to attend an event based on the neighbor's zip code. **Each event published on MyMealConnect.org must have at least one service area defined** even if the agency does not place geographic limitations. This is to help the neighbor see only events that are relevant to their households. When a neighbor goes to MyMealConnect.Org and types in their zip code, the results that are returned to the neighbor are based on the Service Area Geography of each program location. Neighbors will only be shown results that serve their zip codes

View Service Area Geographies

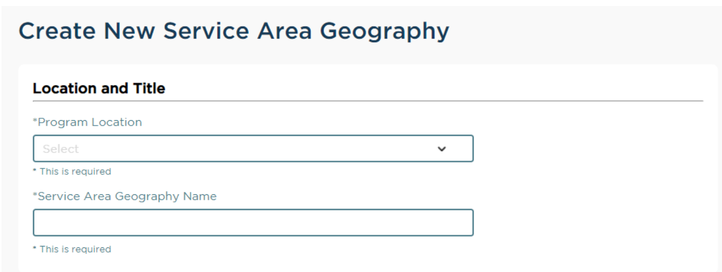
To view all agencies, navigate to the Service Area Geographies section in the **Admin Settings**. Use the Agency drop down list to find associated Service Area Geographies. The list below will then display associated Service Area Geographies.

Tips for using this table:

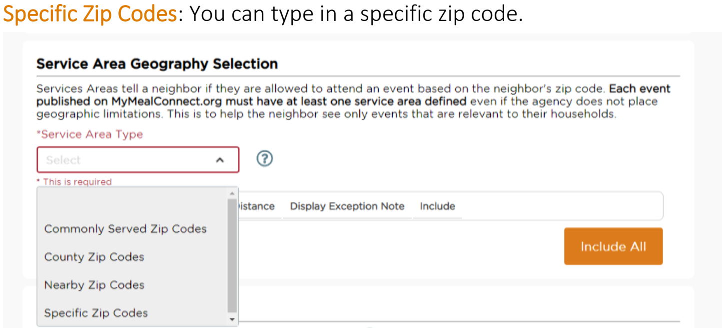
- You can alphabetically sort columns in this table by hovering over and clicking the column title. An up or down arrow will appear to the right of the column that is sorted.
- You can use the search bar below Service Area Geographies title to search the list.

Create New Service Area Geography

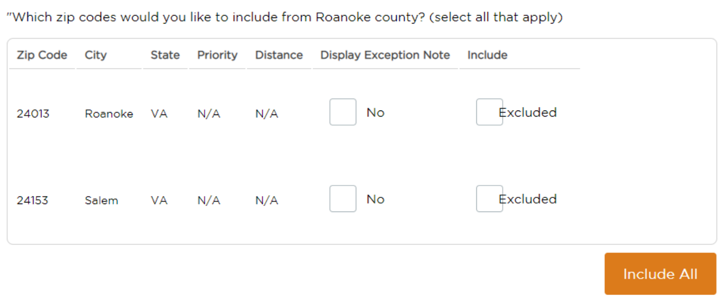
1. To add a new Service Area Geography, navigate to the **Service Area Geographies** section in the **Admin Settings**.
2. Click on the orange button that says **Create New Service Area Geography**.
3. Complete each of the following sections:
    a. **Location and Title:** This associates the Service Area Geography with a specific program location and allows you to save the Service Area Geography with a unique name that will help you identify it in later screens.



    b. **Service Area Geography Selection:** This is where you will determine which zip codes to include. We provide four starting points for including zip codes:
        i. Commonly Served Zip Codes**:** If an agency already has service history, this option will provide a list of zip codes that are served most frequently.
        ii. Nearby Zip Codes: Zip codes within a 10-mile radius of the program location address.
        iii. County Zip Codes: All zip codes within a specific county. Use the drop down to select each county.
        iv. Specific Zip Codes: You can type in a specific zip code.



From this starting point you can choose to Include/Exclude a specific zip code in the list. Additionally, if you only serve part of a zip code you can choose to Display Exception Note to the neighbor such as “43215 west of the river” or “12345 if in the School District”



   c. **Status:** This includes details about each program location at an agency. If you have more than one program location, you will fill this out multiple times.

4. Scroll to the bottom of the screen and click **Save.**

Users

A user is someone with the ability to log into the system and perform various tasks. The level of access and permissions each user has is determined by their **User Type**.

User types

When creating users, each user must be given a User Type. See the table below for user types and permissions at the agency level.

Permissions	Agency Admin	Agency User	Intake User	Viewer
Administrative				
Assign roles and create users	x			
Create and maintain events	x			
Household Management (outside of intake)				
Can view household visit history	x	x		
Can edit household details	x	x		
Can merge duplicate household records	x	x		
Intake				
Can collect data during intake	x	x	x	
Can flag duplicate records during intake	x	x	x	

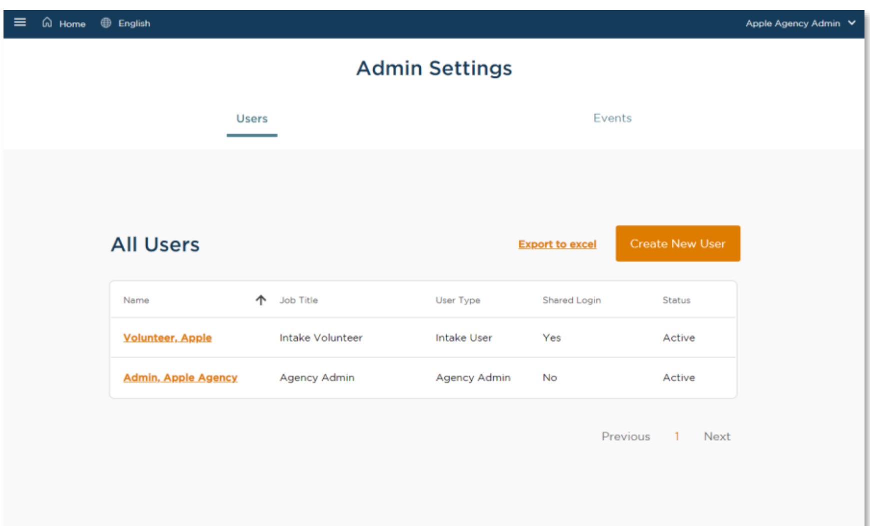
Reporting				
Can view in-app reports (TEFAP Compliance, Quality Control)	x	x		
Can view Summary Statistics report in Tableau	x	x		x
Can save custom views of the Summary Statistics report in Tableau – *coming soon*!	x	x		
Can export deidentified neighbor and service data	x	x		
Can export identifiable data neighbor and service data	x			

View all users

To view all users, navigate to the **Users** section in the **Admin Settings**. This will be a complete list of users that have been established by your agency with some key information about each user.

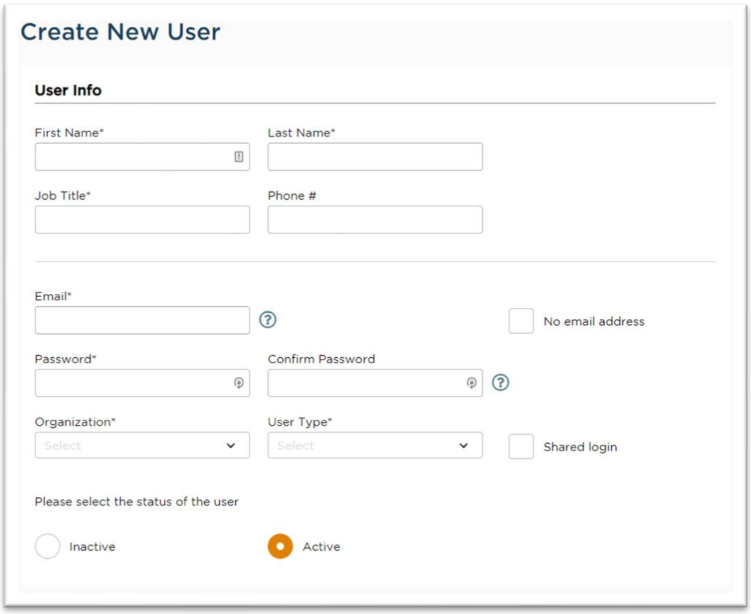
Tips for using this table:

- You can alphabetically sort columns in this table by hovering over and clicking the column title. An up or down arrow will appear to the right of the column that is sorted.
- This list can be exported by clicking the **Export to excel** link.



Create a new user

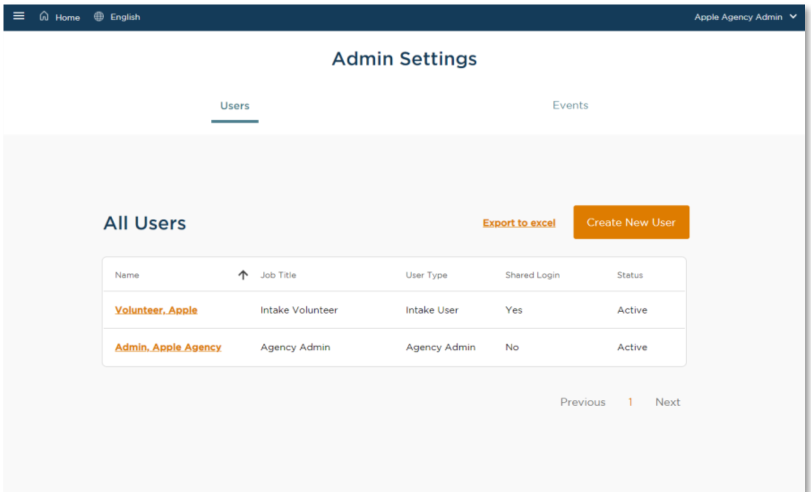
1. To create a new user, navigate to the **User** section in the **Admin Settings**.
2. Click on the orange button that says **Create New User**.
3. Enter the user's **contact information**. You will need the following information (* = required):
    - First Name*
    - Last Name*
    - Job Title*
    - Phone Number
    - E-mail*: If the user does not have an email address, select "No email address".
4. Create a unique **username** and **password** for the user.
    - Ideally, the username should be their email address if they have one. If the user does not have an email address, create another username for them.
    - For Agency User accounts, ideally use a password generator to create a strong password, such as https://passwordsgenerator.net/.
    - For other users, such as volunteers that will be Intake Users and other Viewer accounts, use a strong password but also one that individuals will remember and can easily enter. For example: Apples&Bananas789, Carrots&Peas123, FoodH3lp3rs, etc.
5. Select the **Organization** that you would like to add this user to (e.g., name of the agency).
6. Select the **User Type** from the dropdown menu. Review the list of **User Types** to determine which permissions will be granted to this user.
7. Determine if this user should have a **shared login** or not. Check this box only if this is a login that will be used by multiple individuals, such as rotating volunteers. Leave the box unchecked if this is a named login that will be used by only one individual, such as a staff member or dedicated volunteer.
8. Select the **user's status**: Active or Inactive. If you mark a user as Inactive, they will no longer be able to access or log in to the platform.
9. Scroll to the bottom of the screen and click **Save.**



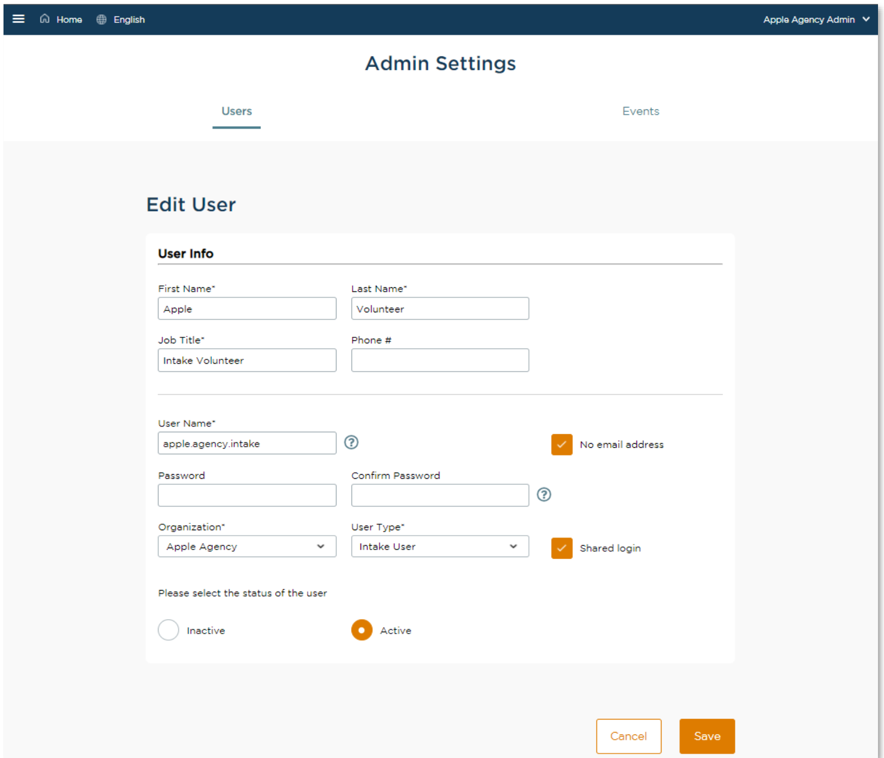
Update or change the status of an existing user

Once a user has been created there may be a need to update their account or to change the status later. To do so:

1. Navigate to the **User** section in the **Admin Settings**.
2. On the complete list of users, click on the **name** of the user you wish to update.



3. This will open the user's profile, where you can make any necessary updates.
    - If a user forgets their password, you can create a new one by typing it into the **Password** field. You cannot recover a lost password. Please be sure to share the new password with the user.
4. If you need to change the status of a user, see the **Status** section. A user can have a status of Active or Inactive. If you mark a user as Inactive, they will no longer be able to access or log in to the platform.
5. Scroll to the bottom of the screen and click **Save.**

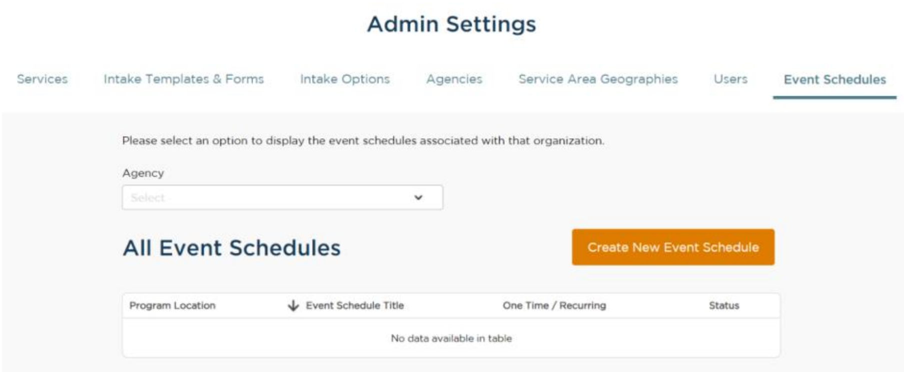


Event Schedules

An event schedule is the recurrence of a distribution at a specific program location. This can be a one-time event schedule such as November 23 or it can be a recurring pattern such as the third Thursday of each month. Event schedules tie together many of the decisions made earlier in the administration section: here you'll select the services, intake form, and program location associated with the event schedule.

View Event Schedules

To view Event Schedules, navigate to the **Event Schedules** section in the **Admin Settings**. This will be a filtered list of Event Schedules that have been established by your food bank and partner agencies with some key information about each Event Schedule.



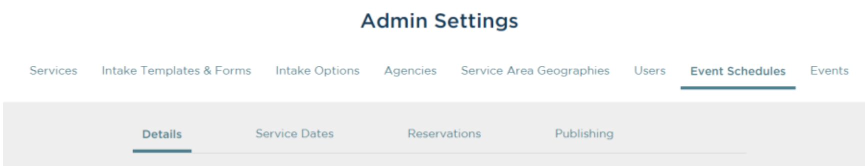
Tips for using this table:

- You can filter the list by selecting an agency from the dropdown list at the top.
- You can alphabetically sort columns in this table by hovering over and clicking the column title. An up or down arrow will appear to the right of the column that is sorted.

Create New Event Schedule

1. To add a new agency, navigate to the **Event Schedules** section in the **Admin Settings**.
2. Click on the orange button that says **Create New Event Schedule**.
3. Complete each of the following sections:

    - **Details:** This section captures the event schedule details, this includes information such as: the name, the schedule, the services and the intake form(s) associated with this event schedule. It also contains optional additional information to help neighbors better understand the distribution. This section is required.
    - **Service Dates:** This section displays the next 30 days of service dates the system has generated. This is a checkpoint for you to ensure that the event schedule has been correctly configured. It additionally has the event schedule status. The event schedule status defaults to inactive. This section is required.
    - **Reservations:** This section determines if the agency accepts internal reservations and details about those reservations. This section is optional to complete, but you must click “save” to open the Publishing tab the first time.
    - **Publishing:** This section contains all the event schedule information related to the neighbor facing portal MyMealConnect.org. The information here contains published event schedule details, published service areas, if the event schedule takes neighbor facing reservations, when the event schedule should display to neighbors, and the publishing status. This section is optional.

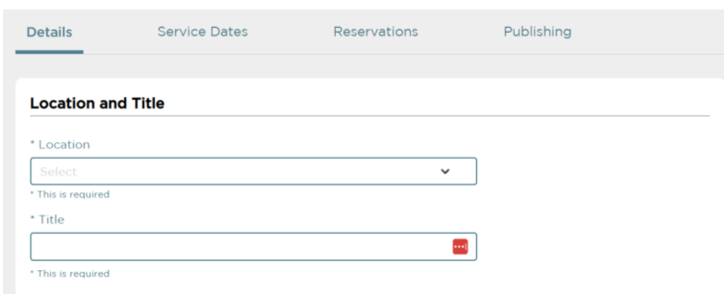


Note: the first time you create a new event schedule you must complete each previous section to open the next.

4. Scroll to the bottom of the screen and click **Save.**

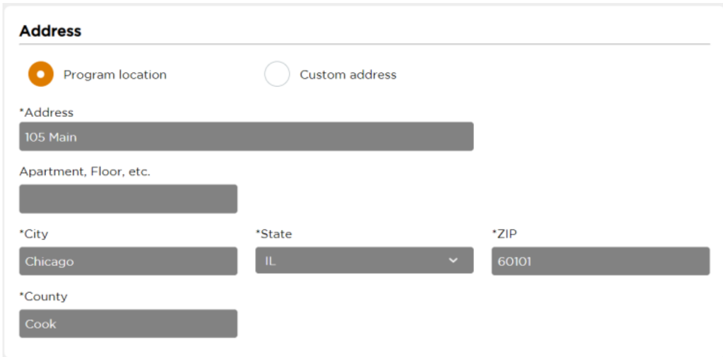
Complete the **Details** Section

1. Complete the **Location and Title** section:
   - Select the **Program Location** from the Location dropdown menu. This is the program to which you'd like to add an event.
   - Create a custom name for your event by typing it into the **Title** field.

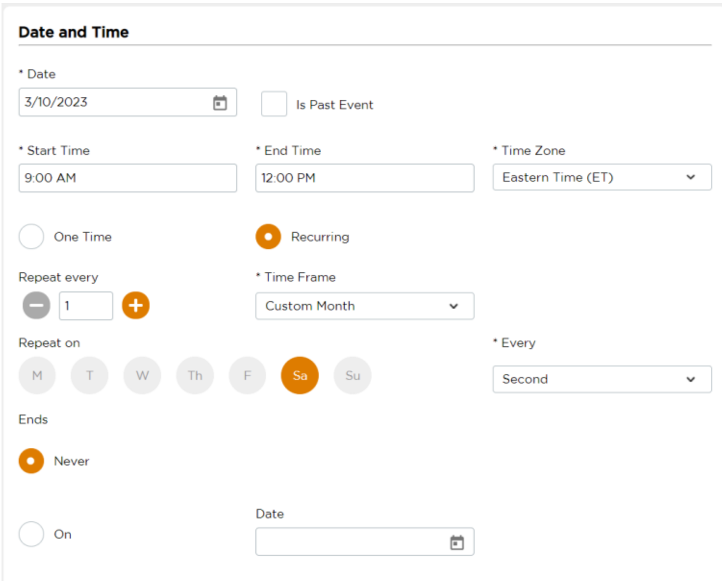


2. Confirm the **Address**:
   - Either select the **Program location** address (default) or select **Custom address** and complete the Address*, Apartment/Floor/etc., City*, State*, Zip* and County*

fields. (* = required)



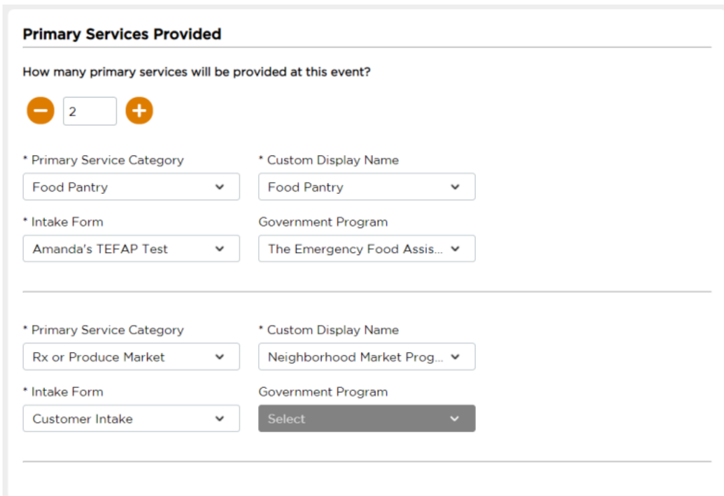
3. Complete the **Date and Time** section by filling in the following (* = required):
    - Date*
    - Start Time*
    - End Time*
    - Time Zone*
    - For Recurring Events only:
        - Recurrence/cadence of event
            - Time Frame
                - **Week**: use if your event occurs the same day(s) each week (i.e., Monday, Wednesday, Friday)
                - **Day**: use if your event occurs every day (i.e., Sunday-Saturday)
                - **Custom Month**: use if your event occurs on the same day each month (i.e., second Saturday)
                    - SI-MC cannot accept two recurrences (i.e., the second and fourth Saturday) in one event schedule, you'll have to make two separate event schedules.
        - End date of event



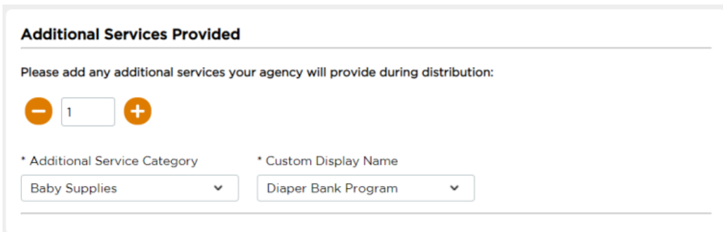
Note: It is important to put the correct time and date(s) for reporting and your neighbors. However, you will be able to record visits during the entire day of an event; intake will not be restricted to the exact start and end time of the event.

4. Complete the **Primary Services Provided** section. The Primary Service(s) are the main service(s) being offered at this event. Often this will be a regulated service such as TEFAP or grocery distribution. There needs to be at least one primary service offered at each event. Use the + or – signs or type in the field to indicate the number of primary services offered at the event.
   - **Primary Service Category:** This is the highest level of categorization and aligns to the overarching Program Types in the Services administration section. It includes four main sections: Grocery Programs, Meal Programs, Benefits Assistance, and Other Service (Non-Food or Benefits). Make this selection first.
   - **Primary Service Subcategory:** This is the specific service that will be provided to the neighbors. This list is responsive to the primary service category and should be selected second. This list includes the display name for all the Services you created and turned on in the Services administration section.
   - **Intake Form:** This determines which form and flow the neighbors will encounter during their visit.

- **Government Program:** If your event offers TEFAP, select "The Emergency Food Assistance Program" from the dropdown. Otherwise, leave it blank.



5. Complete the **Additional Services Provided** section. The Additional Service(s) are the supplemental service(s) being offered at this event. These are often non-regulated or non-food related services that are supplemental to the primary service being offered. An event does not need to have an additional service; however, if you do have an additional service(s), use the + or – signs or type in the field to indicate the number of additional services offered at the event
    - **Additional Service Category:** This is the highest level of categorization and aligns to the overarching Program Types in the Services administration section. It includes four main sections: Grocery Programs, Meal Programs, Benefits Assistance, and Other Service (Non-Food or Benefits). Make this selection first. *Tip:* In many cases, the additional services will be categorized as "Benefits Assistance" or "Other Service (Non-Food or Benefits)".
    - **Additional Service Subcategory:** This is the specific service that will be provided to the neighbors. This list is responsive to the additional service category and should be selected second. This list includes the display name for all the Services you created and turned on in the Services administration section.



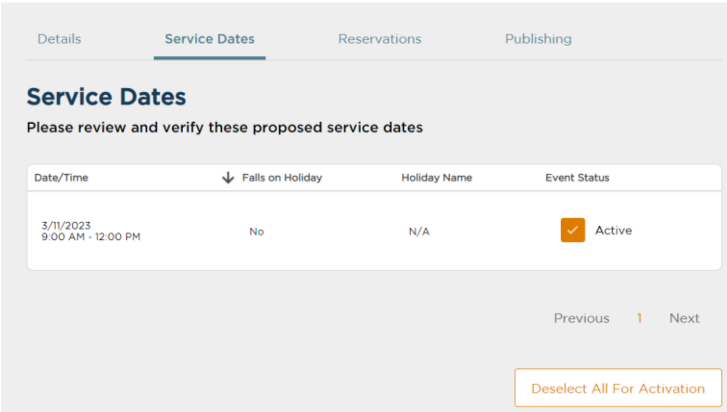
6. Complete the **Types of Food Offered** section. This optional section is to provide more detail to neighbors about what types of food will be distributed at an event. Some examples may include canned goods, fresh produce, pet food, etc.
7. Complete the **Eligibility Guidelines** section. This optional section is to provide more detail to neighbors about what eligibility criteria the neighbor must meet in order to be served at an event. Some examples may include your states TEFAP/USDA guidelines.
8. Complete the **Method of Shopping** section. Select the types of shopping mode(s). This optional section is to provide more details to neighbors about what they can expect at the event.
   - **No Choice**: Every neighbor gets the same, predetermined items. Volunteers/staff handle the food and prepare bags or boxes for each neighbor.
   - **Limited Choice**: Neighbors can choose among a few prepackaged boxes or can combine a prepackaged box with limited choice of certain food items from a table or basket. Neighbors typically do not touch or handle the food directly.
   - **Modified Choice**: Neighbors select items from a menu or tell volunteers/staff what food items they want by pointing, and volunteers/staff then pack a bag or box for them. Neighbors may select from general food items such as soup or cereal, but not the specific type. Neighbors typically do not touch or handle the food directly.
   - **Full Choice**: Neighbors are allowed to shop for their food much like a typical grocery shopping experience and freely handle and select food items. The pantry may set limits on the number of items per food group or based on family size. Neighbors can see food options and can select what they want. If ordering online or over the phone, neighbors may select from specific food items such as chicken noodle soup or Cheerios.
9. Complete the **Mode of Distribution** section. Select the types of distribution mode(s). This optional section is to provide more details to neighbors about what they can expect at the event.
   - Pick-up
   - Curbside
   - Delivery

- Locker box

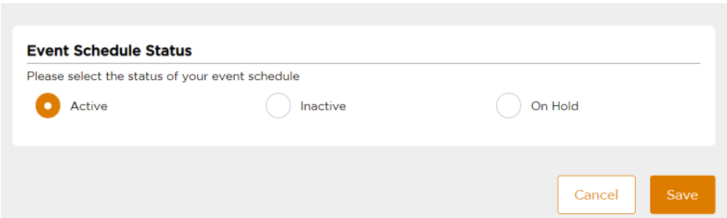
10. Scroll to the bottom of the screen and click **Save**

Complete the **Service Dates** Section

1. Complete the **Details** section.
2. **Review and verify the proposed service dates**. Service Insights on MealConnect automatically generates events based on the event schedule you have created in the details screen. The Service Dates screen generates the next 30 days for you to review. This is a confirmation to ensure that the event schedule has been correctly configured and the system is generating the correct event dates.



3. Change the Event Schedule Status from Inactive (default) to Active.

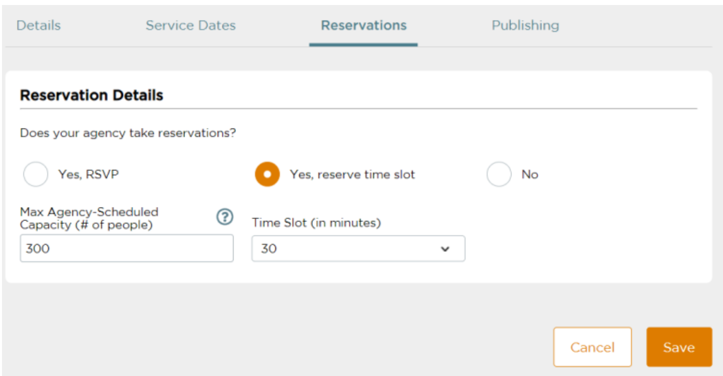


4. Scroll to the bottom of the screen and click **Save.**

Complete the **Reservations** Section

1. **Complete the Details and Service Dates sections.**
2. **Open the Reservation Sections**
3. The default will be no. Choose **Yes, RSVP** or **Yes, reserve time slot**
   a. Yes, RSVP: a count-me-in feature that signifies the neighbor will be served sometime during the open hours of the event.

   b. Yes, reserve time slot: allows 15-, 30-, or 60-minute incremental timeslots throughout the event.
4. Enter the **Max Internal Capacity** of the event (the total number of reservations the agency will accept). Leave it blank if there is no limit.
5. Click **Save**.

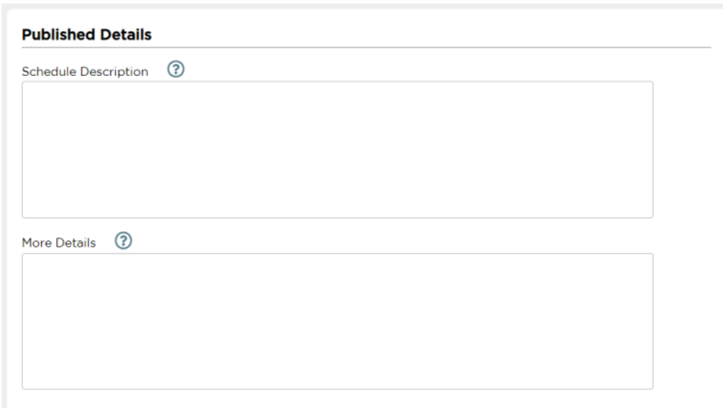


Note: even if an event does not accept reservations, you must click save on this screen to open the publishing tab upon event schedule creation.

Complete the **Publishing** Section

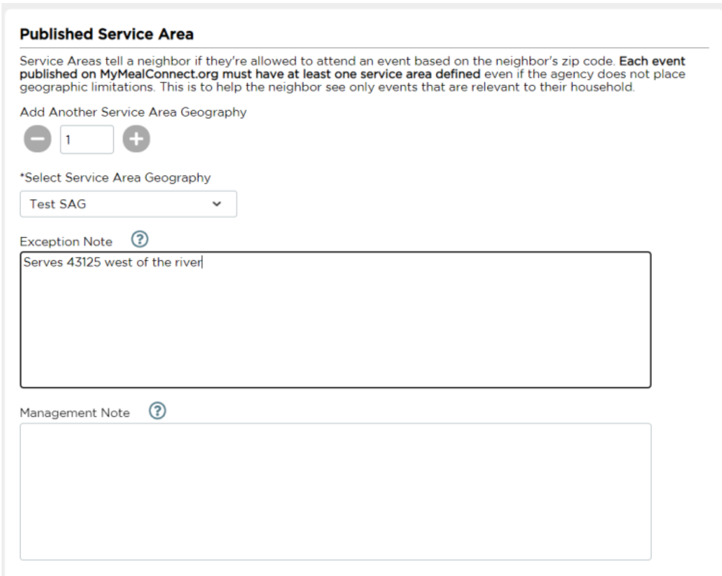
1. Complete the Details, Service Dates and Reservations sections
2. Complete the Published Title section by confirming the Event Title (pre-populated from the Event Schedules Detail section) and by choosing a Public Facing Template
   - Intake with Basic Income Eligibility
   - Intake with Income & Program Eligibility
3. Confirm the **Address**:
   - Either select the **Program location** address (default) or select **Custom address** and complete the Address*, Apartment/Floor/etc., City*, State*, Zip* and County* fields.
4. Complete the **Published Details** section to offer more insight into your event.
   - **Schedule Description**: This is the text version of the event schedule recurrence. This is to help both you and neighbors understand when an event recurs. If your event repeats regularly type the pattern in this box. This should be something like 'Second Saturday of each month 12 - 4 pm' or 'Monday-Thursday 9 am - 5 pm'. If your event does not have a standard pattern, you can leave it blank.
   - **More Details**: This offers an area to give the neighbor additional information about your event. This can be information such as the process 'bring your id' or something about the way the pick-up will work such as 'this is a drive through

distribution'. Type in any additional information you'd like to offer the neighbor about this event.



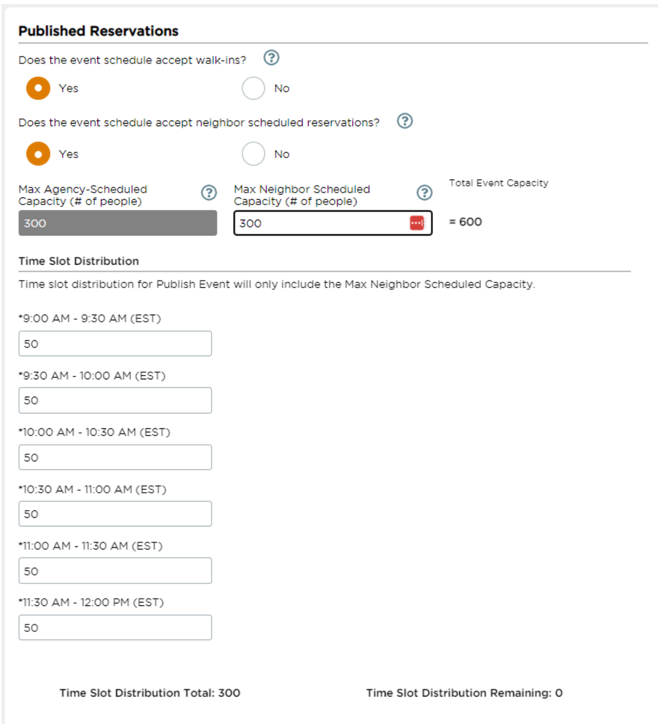
5. Complete the **Published Service Area** section to tie a previously created Service Area Geography to your published event schedule.
    - **Select Service Area Geography**: Use this trop down to select your Service Area Geography. Note: If you do not see any Service Area Geographies in this drop down, go back to the administration section for Service Area Geographies and create a service area geography for this program location.
    - **Exception Note:** Not all service areas will fall within a specific zip code geography. This information will be displayed to the neighbor to help them understand their eligibility. If your event has a service area that does not fit into a specific zip code (such as a school district limitation) type that into this box. Example: "Only serves residents of Fairfield Public School District".
    - **Management Note:** Sometimes it may help users to have notes about an event that is not displayed to neighbors. Use this text box to save any notes about an

event that you do not want to display to a neighbor.



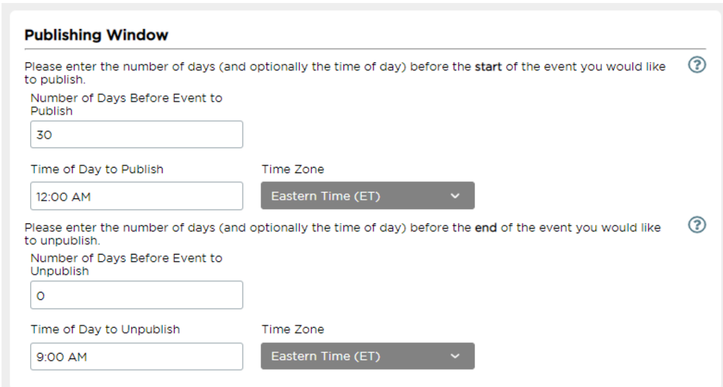
6. Complete the **Published Reservations** section to help your neighbors understand if they need to make a reservation for your event or not.
   - **Does the event schedule accept walk-ins?**: This question is helping neighbors understand if they must have a reservation for an event. Event schedules can be displayed to neighbors with no reservation functionality, with RSVP function or with a 'reserve time slot'. If neighbors can attend the event without a reservation select yes. If neighbors must have a reservation to attend the event, select no.
   - **Does the event schedule accept neighbor scheduled reservations?** This question is helping neighbors understand if they must have a reservation for an event. Events can display to neighbors with no reservation functionality, with RSVP functionality or with a 'reserve time slot' functionality. (RSVP and time slot functionality is determined on the 'Reservations Tab'.) If neighbors should make a reservation online to attend the event select 'yes'. If neighbors should not make a reservation online to attend the event, select 'no'. Note: If you would like to change the types of reservations accepted at this event schedule (RSVP or time slot) return to the Reservations section of the Event Schedule section and make your changes there first.
     - If time slot is selected, you will have the ability to change the number of appointments per time slot that can be made by neighbors. SI-MC will attempt to distribute these time slots evenly, but if there is an odd number and/or you need

to make changes based on outside factors you can do so here.



7. Complete the **Publishing Window** section to determine when this event schedule will appear on MyMealConnect.org.
    - Number of Days Before Event to Publish: This question helps determine the earliest day and time neighbors can see an event and potentially begin to make a reservation for it. You may want to open an event exactly at 10 am one week before the event starts. These boxes will help you do that. If there is a specific time and number of days before an event you would like to begin accepting reservations put that information in these boxes. Otherwise, the system will create a default of 30 days before the event starts.
    - Number of Days Before Event to Unpublish: This question helps determine the last day and time neighbors can see an event and potentially make a reservation online for it. You may want to close reservations for an event exactly 48 hours before the event ends. These boxes will help you do that. If there is a specific time and number of days before an event ends that you would like to stop showing the event and accepting reservations put that information in these boxes. Otherwise, the system will create a default. Be sure to calculate from the

END of the event, not the beginning.



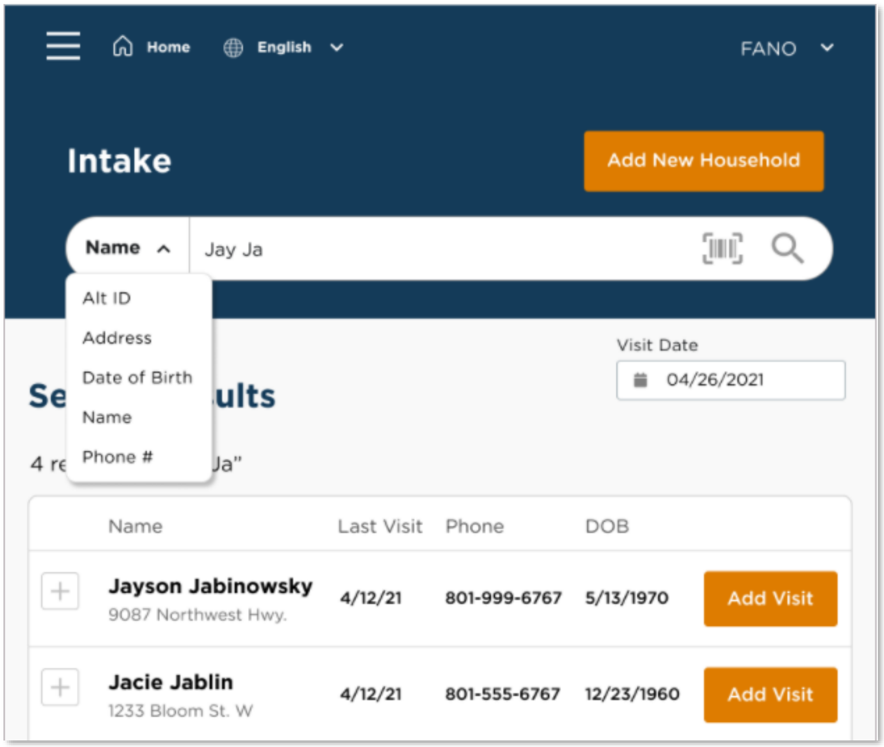
8. Complete the **Publishing Status** section. Only event schedules with an active publishing status will appear on MyMealConnect.org.
9. Click **Save**.

INTAKE

Intake is the process to create unique profiles for each household you serve and record the services they receive at your agency's events, including regulated services, such as TEFAP, and non-regulated services. You can also manage household profiles and visit records for past events through the intake function.

SEARCH

The Search function allows you to identify whether a neighbor already exists in the system before you begin intake. Neighbors will be included in search results if the address ZIP Code matches the ZIP 3s that were tagged to your Program Location during administrative setup. For example, if your Program Location's ZIP 3s are 600, 601, and 602, then any households whose zip codes begin with those three digits will appear in your search results.

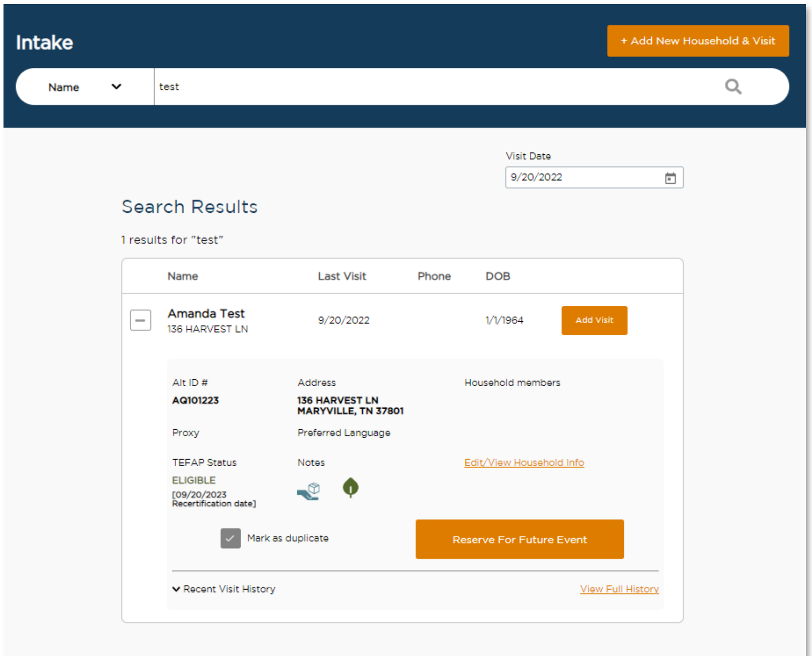


1. From the home screen, begin by searching the system for a neighbor's profile. The **search** bar is located at the top of the screen. You can search the system for a neighbor's profile by:

   - **Alt. ID:** use this for quick check-in if the returning neighbor has a barcode card or Alt. ID number. When selected, the barcode icon will appear on the right-hand side of the search bar. Click on the barcode icon to activate your device's camera or external barcode scanner. Scanning a barcode card will pull up the neighbor's household profile. You can also type an alt. ID number directly into the search bar if the neighbor knows their Alt. ID number but doesn't have their card. If you are on a mobile device such as a phone or tablet, you can also scan a QR code just as you would a barcode.

- **Address:** you can search for a neighbor's street address (e.g., *5 Test Dr.*). However, you cannot search by city, state, or ZIP code.
- **Date of Birth:** your search must be in the format MM-DD-YYYY, MM/DD/YYYY, MM.DD.YYYY or MMDDYYYY.
- **Name:** you can search by last name (e.g., *Doe*), first and last name (e.g., *John Doe*) or last, first name (e.g., *Doe, John*). You can use a partial name search.
- **Phone #:** your search must be in the format 123-123-4444, 1231234444, or the last 4 digits (e.g., *4444*).

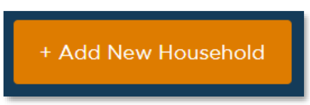
2. Your search results will show key information about each neighbor, including name, address, phone #, date of birth, household members' names, and last visit date, amongst other things.
3. From the search results, you can also:
   - Add a Return Visit
   - Add a Reservation
   - Edit/View Household Info
   - Household Visit History
   - Mark as duplicate



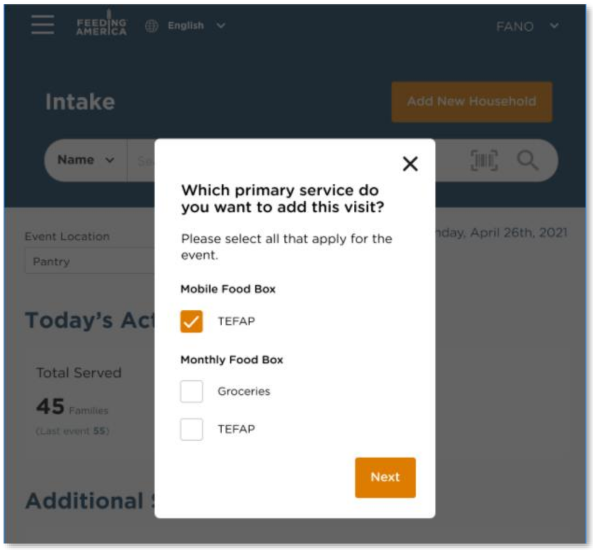
ADD A NEW HOUSEHOLD

Add New Household is the process you complete to record a visit for a new household during an event.

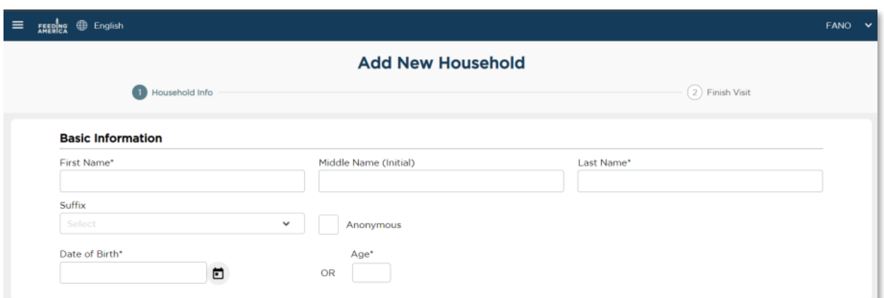
1. From the home screen, click the **Add New Household** button on the top right of the home screen. To avoid creating a duplicate profile, first search for the household to confirm that they haven't already been added to the system by your agency or another in your network.



2. Choose the **primary service(s)** the neighbor is receiving. This will inform the **intake form** you complete with the neighbor. If your program location only has one primary service at an event, you will still need to select that service. Click **Next** to begin adding the neighbor's household information.



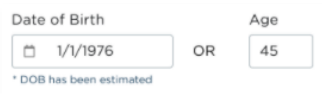
3. **For non-regulated services** (i.e., everything except TEFAP), there are 2 steps to adding a new household:
    1. **Household Info**
    2. **Finish Visit**



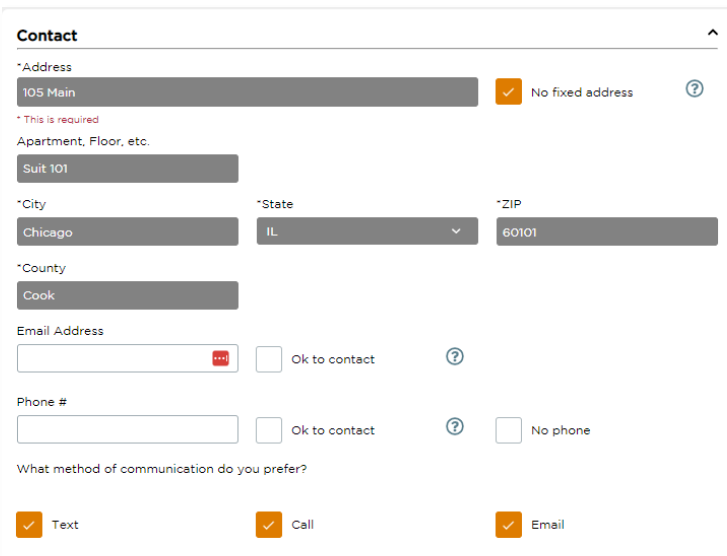
4. On the **Household Info** screen, you will ask the neighbor for their basic information and any additional questions used by your food bank and/or agency. The full list of questions is below (* = required), but the list you see under Household Info will be pre-determined by your food bank, agency, and the specific intake form you are using.

- **Basic information**

- Name*: First and Last name are required unless the neighbor requests to be Anonymous
- Date of Birth or Age*: Age is required if date of birth is unknown; date of birth will be estimated as 1/1/YYYY



- Contact
  - Address*: Address will auto-populate as you type; you can click on the correct address once it appears and all the address fields will automatically fill in. Select **No fixed address** if the neighbor does not have a current address. When selected, your agency's main address will be automatically entered in the address field.

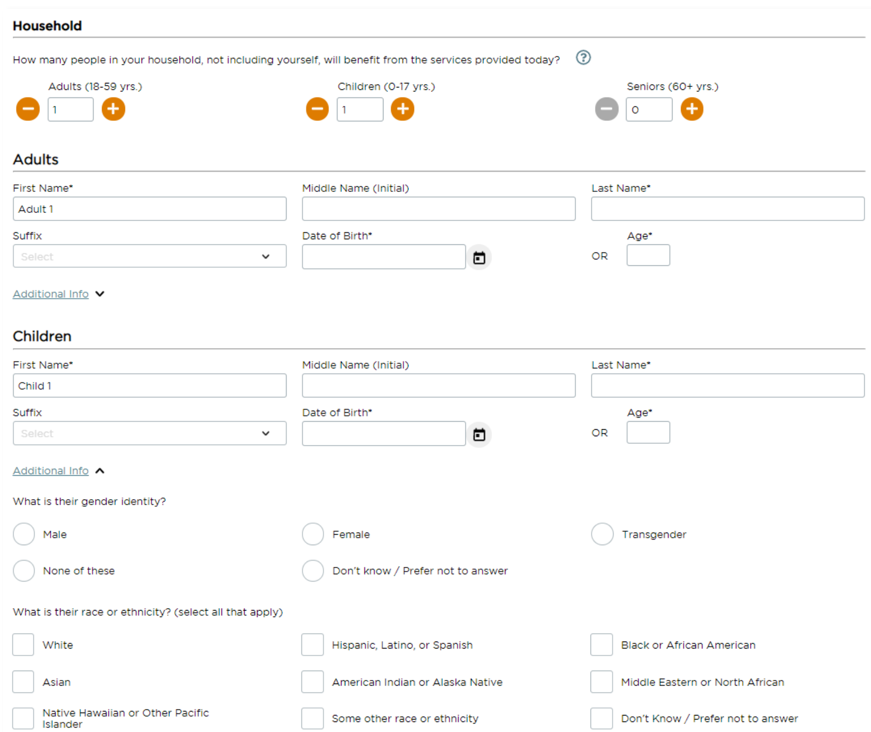


  - Living Situation
  - Email Address: Select **Ok to contact** if the neighbor is okay with your agency emailing them.
  - Phone Number*: Select **Ok to contact** if the neighbor is okay with your agency calling or texting them. If a neighbor does not have a phone number, ask them to

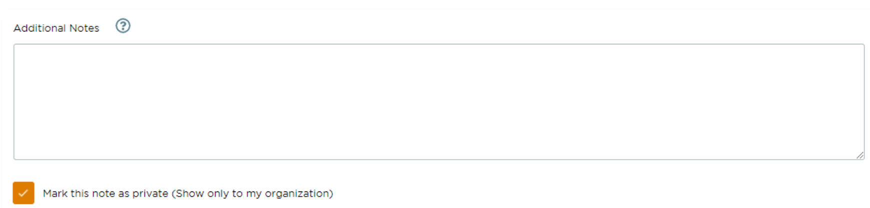
provide one of a friend or family member or check No phone. Phone numbers are an important method of contact for food recall information.

    - **Preferred Communication Methods(s)**

- **Gender Identity***
- **Race or Ethnicity***
- **Household Member Count*:** use the orange + and - buttons to indicate the number of *additional* adults, children, and seniors who are in the household and will benefit from the service provided; you can also type the number directly into the box. For each household member, a field will pop up with space to enter additional info about them:
    - **Name*:** This will autofill with "Adult/Child/Senior" and the head of household's last name. You can write over these.
    - **Date of Birth or Age***
    - **Gender Identity**
    - **Race or Ethnicity**

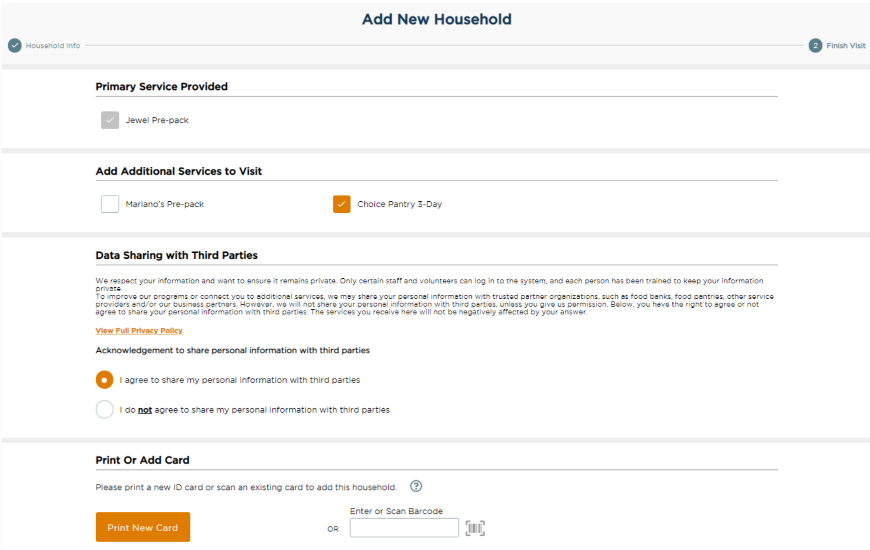


- **Proxy:** Select "yes" if there someone outside of the neighbor's household is authorized to pick up food for them. Types of proxies include general proxy, case manager, authorized representative, and other.
- **Household Receipt of SNAP***
- **Other Government Programs**
- **Employment Status**
- **Household Disability Status**
- **Household Monthly Income**
- **Household Military Status**
- **Household Dietary Factors or Concerns**
- **Household Health Conditions**
- **Household Food Insecurity**
- **Assistance Needs**
- **Notes:** you can record additional information about a neighbor's experience, needs, preferences, or follow-up items. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.



5. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.

6. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.



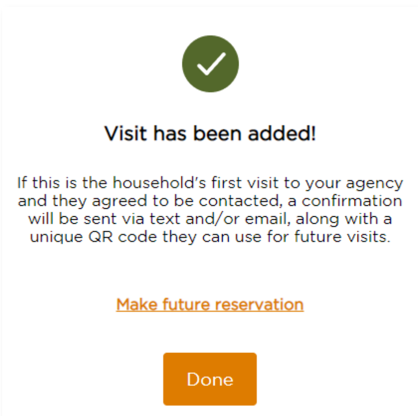
- **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
    a. Add Pounds, Pieces, Meals and/or Dollars
- **Add Additional Services to Visit**: select any additional services provided to the neighbor; this list is pre-set for each event.
    a. Add Pounds, Pieces, Meals and/or Dollars
- **Print or Add Card:** A new or existing barcode and QR card can be used to make return visits a simple one-step process.
    a. Choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
    b. Choose **Enter or Scan Barcode** to link an existing card to the household's account, such as a neighbor's grocery store shopper card, library card, or other barcode card. You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device's camera or barcode scanner.

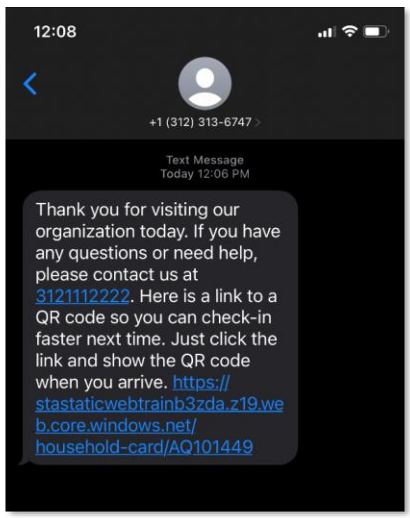
  You can have multiple new and existing barcodes associated with a household's account. A barcode card can be used at any agency using the system.

7. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the

contact number in the follow-up text/email. A text/email will <u>only</u> be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).

8. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.



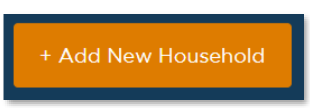


At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

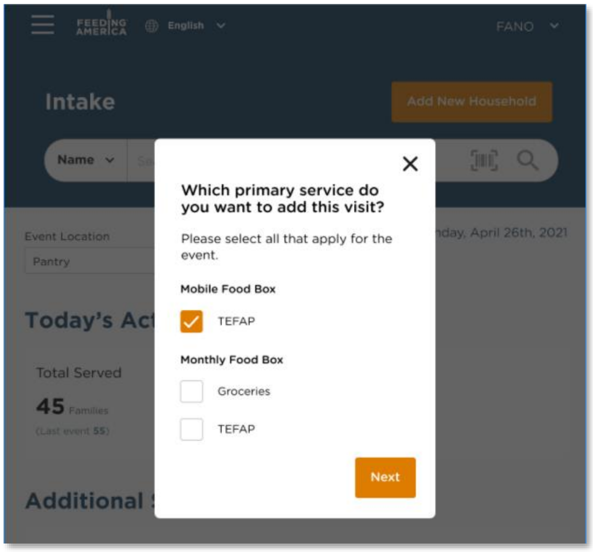
Add a New Household (TEFAP)

Add New Household is the process you complete to record a visit for a <u>new</u> household during an event.

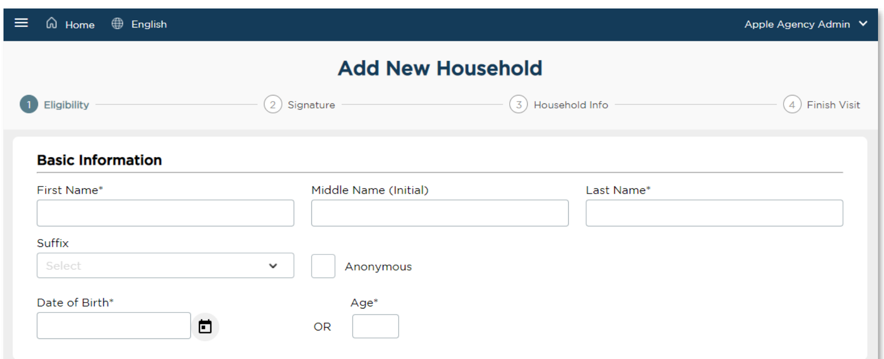
1. From the home screen, click the **Add New Household** button on the top right of the home screen. To avoid creating a duplicate profile, first search for the household to confirm that they haven't already been added to the system by your agency or another in your network.



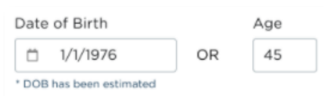
2. Choose the **primary service(s)** the neighbor is receiving. For a TEFAP visit, the primary service must be a TEFAP service so that the TEFAP **intake form** is activated. If your program location only has one primary service at an event, you will still need to select that service. Click **Next** to begin adding the neighbor's household information.



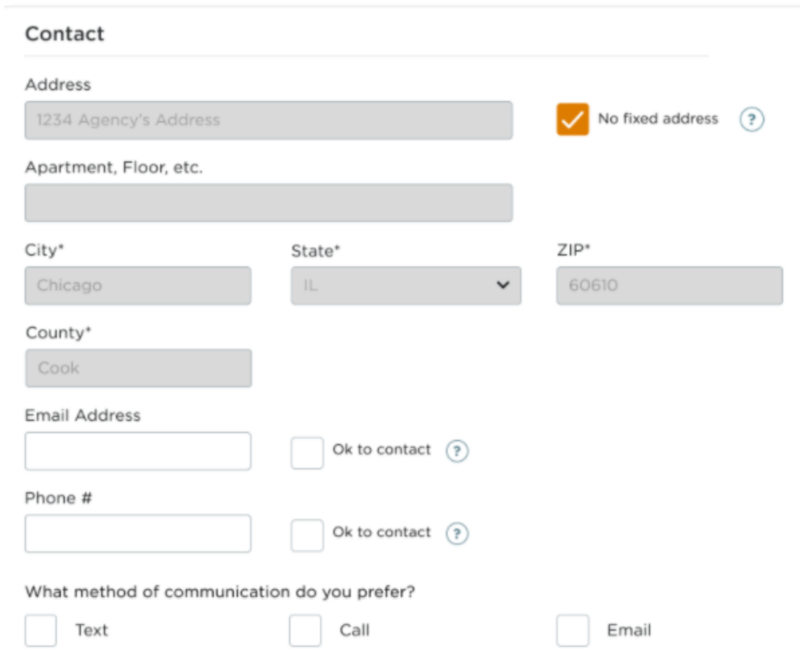
3. **For TEFAP**, there are 4 steps to adding a new household:
    1. Eligibility
    2. Signature
    3. Household Info
    4. Finish Visit



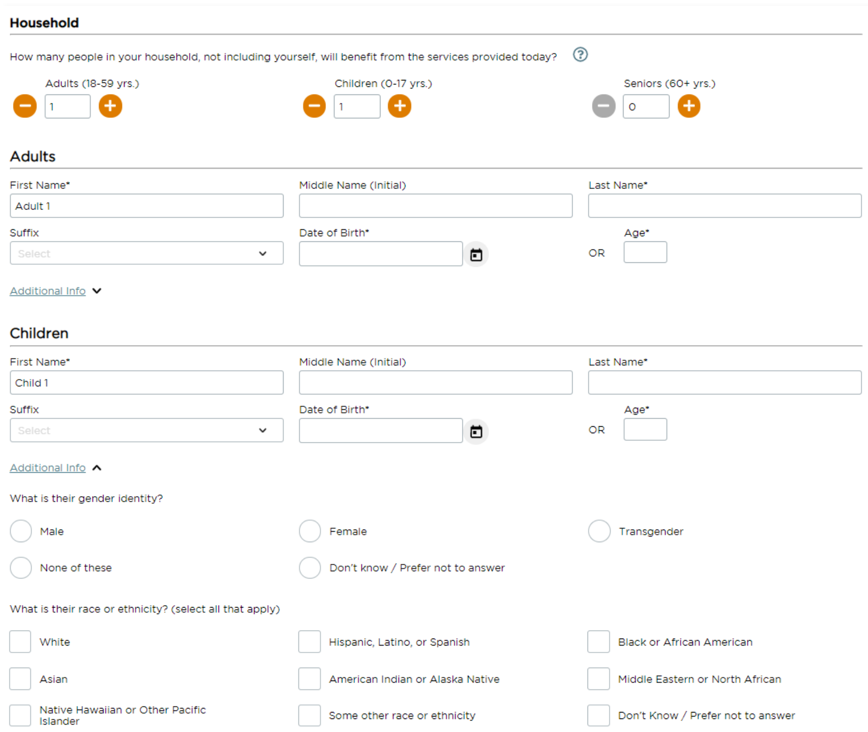
4. On the **Eligibility** screen, you will ask the neighbor for their basic information and any questions required by your state to screen for TEFAP eligibility. The Eligibility screen will be customized to your state and has been approved by your state's TEFAP administration agency. All fields marked with a * are required unless not permitted by your state's TEFAP regulatory body.
   - Basic information
     - **Name*:** First and Last name are required
     - **Date of Birth or Age*:** Age is required if date of birth is unknown; date of birth will be estimated as 1/1/YYYY



   - Contact
     - **Address*:** Address will auto-populate as you type; you can click on the correct address once it appears, and all the address fields will automatically fill in. Select **No fixed address** if the neighbor does not have a current address. When selected, your agency's main address will be automatically entered in the address field.
     - **Email Address**: Select **Ok to contact** if the neighbor is okay with your agency emailing them.
     - **Phone Number*:** Select **Ok to contact** if the neighbor is okay with your agency calling or texting them. If a neighbor does not have a phone number, ask them to provide one of a friend or family member or check No phone. Phone numbers are an important method of contact for food recall information.
     - **Preferred Method(s) of communication**



- **Household Member Count*:** use the orange + and - buttons to indicate the number of *additional* adults, children, and seniors who are in the household and will benefit from the TEFAP service; you can also type the number directly into the box. For each household member, a field will pop up with space to enter additional info about them:
    - **Name*:** This will autofill with "Adult/Child/Senior" and the head of household's last name. You can write over these.
    - **Date of Birth or Age*:** Age is required if date of birth is unknown; date of birth will be estimated as 1/1/YYYY
    - **Gender Identity**
    - **Race or Ethnicity**

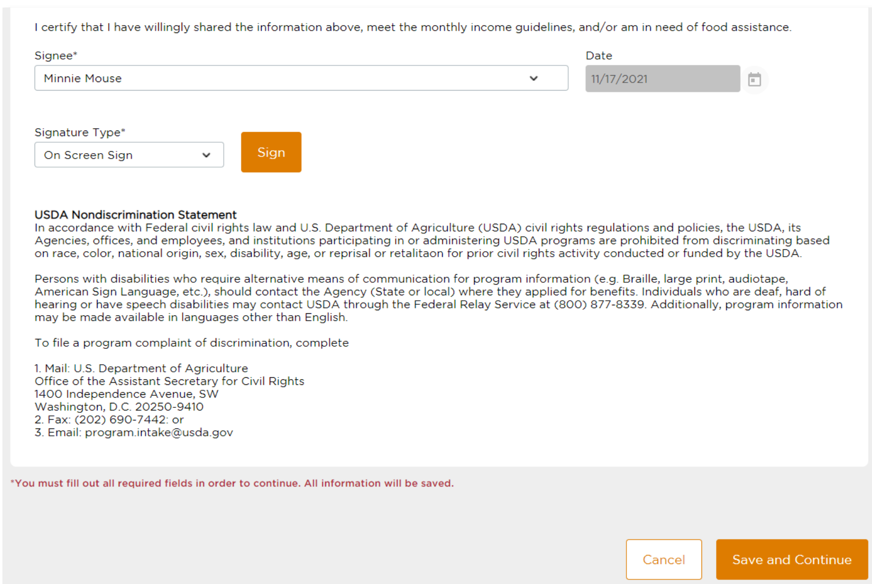


- **Proxy:** Select "yes" if there someone outside of the neighbor's household is authorized to pick up TEFAP for them. Types of proxies include general proxy, case manager, authorized representative, and other.
- **Household Receipt of SNAP***
- **Other Government Programs:** This list will, at a minimum, align with any categorical eligibility programs in your state. Additional programs can be optionally included. If the neighbor's household qualifies for TEFAP based on categorical eligibility, the system will flag this automatically.
- **Income**: to qualify for TEFAP, the neighbor's household income must be lower than a set amount in each state, based on household size. This amount has been automatically programmed into the system to display a per month and per year amount.
- Program Eligibility

5. Once you confirm that the neighbor is eligible for TEFAP, click **Save and Continue**. If you choose to **Cancel**, all information entered will be lost. Note: the system will not prevent a

neighbor who has stated they are ineligible from continuing to the TEFAP signature page. It is up to the intake worker to determine eligibility based on the neighbor's answers.

6. You will be taken to the **Signature** screen.
   - You will first see a recap of the neighbor's eligibility information: name, contact, address, household size, and income limit. Please confirm that this is correct.
   - **Signee*:** Select the person who is there in-person to pick up the TEFAP food. The drop-down list will display all active household members over 18 years old along with any active proxies.
   - **Signature Type*:** Select the neighbor's preferred signature method. The drop-down list will display all accepted signature types for TEFAP in your state.

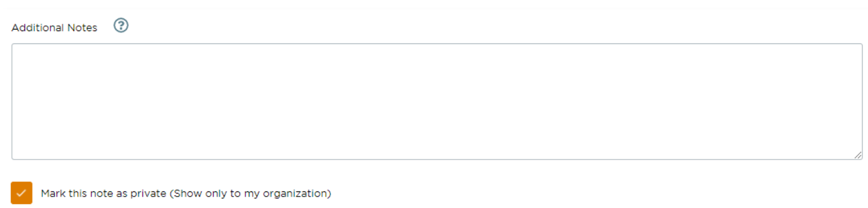


7. Once you collect the neighbor's signature, click **Save and Continue**. If you choose to **Cancel**, all information entered will be lost.

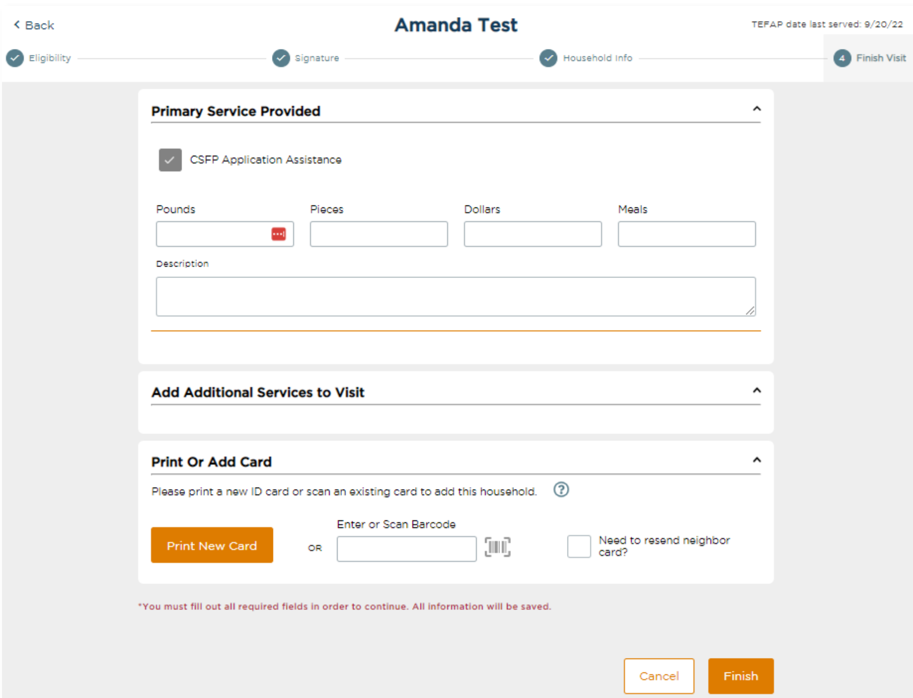
8. You will be taken to the **Household Info** screen, where you can ask any additional questions used by your food bank and/or agency that are not required for TEFAP. At the top of this page, you will see a header that says, "These Questions are Optional and will not impact your TEFAP." It should be made clear to the neighbor that this information is in addition to the TEFAP regulations and will have no impact on their qualification for services. The full list of

questions is below (* = required, unless not permitted by your state's TEFAP regulatory body), but the list you see under Household Info will be pre-determined by your food bank and the specific intake form you are using.

- **Gender Identity***
- **Race or Ethnicity***
- **Living Situation**
- **Preferred Language(s)**
- **Employment Status**
- **Household Disability Status**
- **Household Monthly Income**
- **Household Military Status**
- **Household Dietary Factors or Concerns**
- **Household Health Conditions**
- **Household Food Insecurity**
- **Assistance Needs**
- **Notes:** you can record additional information about a neighbor's experience, needs, preferences, or follow-up items. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.



9. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.
10. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.

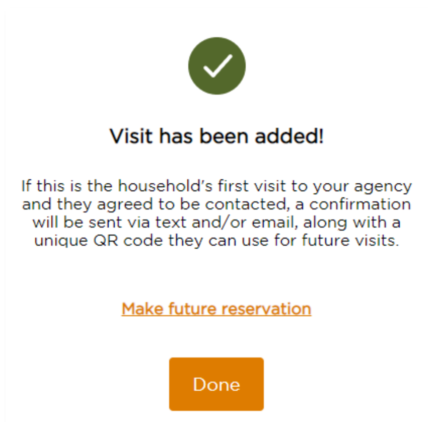


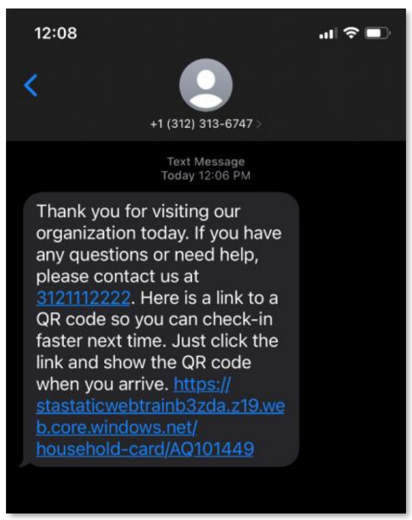
- **Primary Services Provided:** this confirms the TEFAP primary service you selected at the beginning of intake; you cannot change this selection.
    a. Add Pounds, Pieces, Meals and/or Dollars
- **Add Additional Services to Visit**: select any additional services provided to the neighbor; this list is pre-set for each event.
    a. Add Pounds, Pieces, Meals and/or Dollars
- **Print or Add Card:** A new or existing barcode and QR card can be used to make return visits a simple one-step process.
    a. Choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
    b. Choose **Enter or Scan Barcode** to link an existing card to the household's account, such as a neighbor's grocery store shopper card, library card, or other barcode card. You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device's camera or barcode scanner.

  You can have multiple new and existing barcodes associated with a household's account. A barcode card can be used at any agency using the system.

11. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will <u>only</u> be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).

12. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.

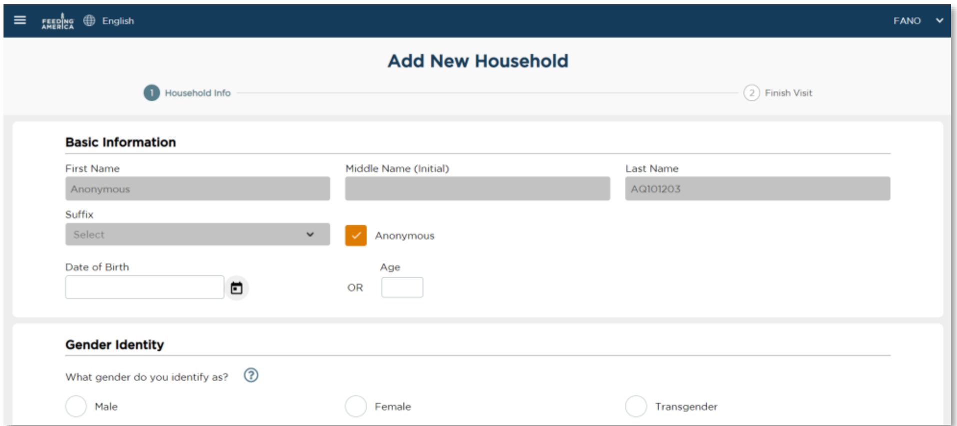




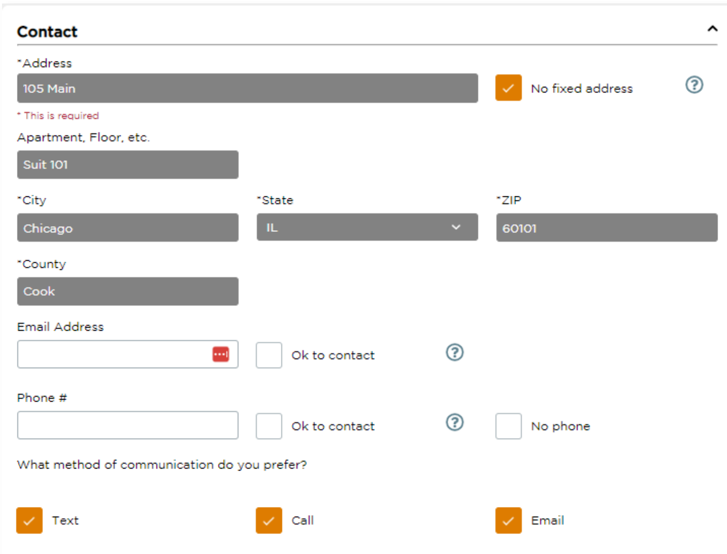
At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

Add Anonymous Visit

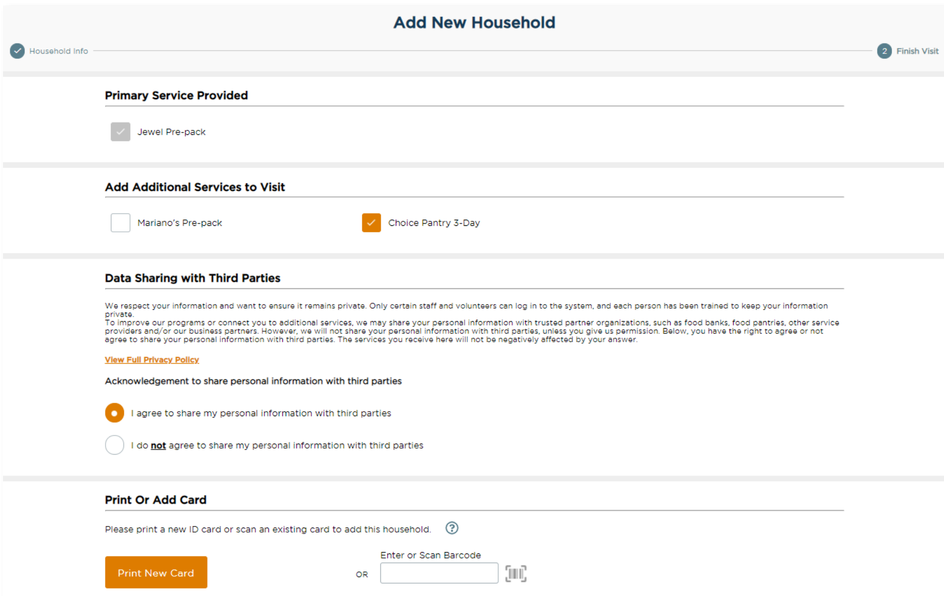
The anonymous visit option allows you to create a unique visit or household record for a neighbor who does not wish to share some or any of their personal information. It is a flexible option that removes the requirement to answer any question, thus giving the neighbor the choice to share. **Note: the anonymous visit <u>cannot</u> be used for TEFAP services in most states.**



1. From the home screen, click the **Add New Household** button on the top right of the home screen.
2. Select a non-regulated **primary service** (i.e., not TEFAP).
3. On the **Household Info** screen, under Basic Information, click the **Anonymous** checkbox.
    - This will automatically grey-out First Name, Middle Name, Last Name, and Suffix fields. You cannot edit these fields.
    - First Name will be recorded as "Anonymous."
    - Last Name will be recorded as the neighbor's unique Alt. ID. You can write down this Alt. ID and give it to the neighbor to use at future visits. This will allow you to record future visits under the same profile, thus eliminating a duplicate record in the system.
4. All other questions are optional. The neighbor can still choose to provide their date of birth or gender identity, for example.
5. Under **Contact**, you will need to click **No fixed address** if the neighbor does not want to share their address. When selected, your agency's main address will be automatically entered in the address field.



6. Once you complete the **Household** Info screen, click **Save and Continue** to move on to the **Finish Visit** screen. If you choose to **Cancel**, all information entered will be lost.
7. On the **Finish Visit** screen, you will go through the same steps as a regular visit to complete the visit.



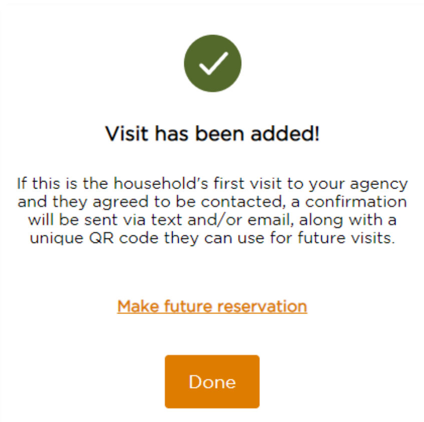
- **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
- **Add Additional Services to Visit**: select any additional services provided to the neighbor; this list is pre-set for each event.
- **Print or Add Card:** You can still use the "Print or Add Card" feature with anonymous visits. In fact, it will reduce duplicates in the system if you provide a unique barcode to an anonymous neighbor that they can use in the future, while remaining anonymous.
    a. Choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
    b. Choose **Enter or Scan Barcode** to link an existing card to the household's account, such as a neighbor's grocery store shopper card, library card, , or other barcode card. You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device's camera or barcode scanner.

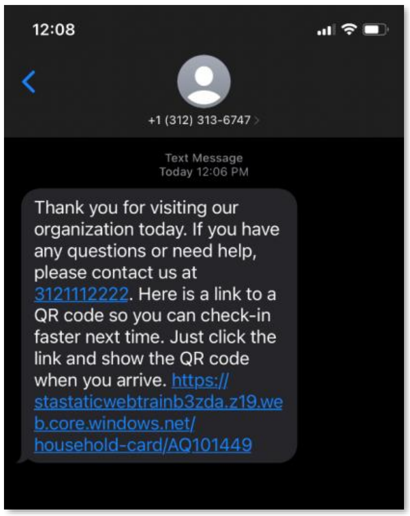
  You can have multiple new and existing barcodes associated with a neighbor's account. A barcode card can be used at any agency using the system.

13. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the

Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).

14. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.





Add a Return Visit

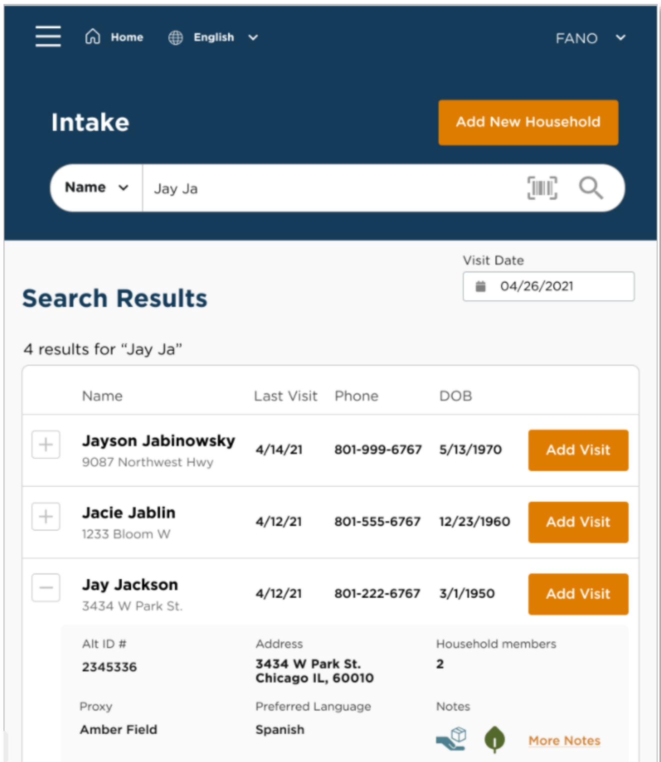
A **Return Visit** allows you to record a visit for a neighbor or household that already exists in the system. This will create a visit history for the household and is critical for reducing duplicates in the system.

1. From the home screen, begin by searching the system for a neighbor's household profile. The **search** bar is located at the top of the screen. You can search the system for a neighbor's profile by:

   - **Alt. ID:** use this for quick check-in if the returning neighbor has a barcode card of Alt. ID number. When selected, the barcode icon will appear on the right-hand side of the search bar. Click on the barcode icon to activate your device's camera or external barcode scanner. Scanning a barcode card will pull up the neighbor's household profile. You can also type an alt. ID number directly into the search bar if the neighbor knows their Alt. ID number but doesn't have their card.

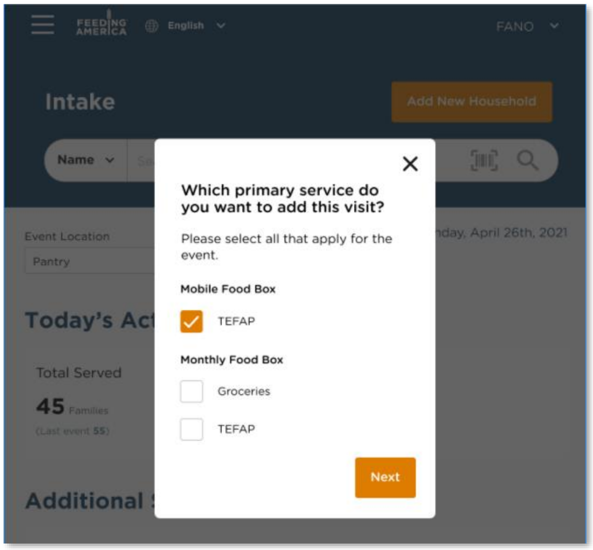
- **Address:** you can search for a neighbor's street address (e.g., *5 Test Dr.*). However, you cannot search by city, state, or ZIP code.
- **Date of Birth:** your search must be in the format MM-DD-YYYY, MM/DD/YYYY, MM.DD.YYYY or MMDDYYYY.
- **Name:** you can search by last name (e.g., Doe) or first and last name (e.g., *John Doe*).
- **Phone #:** your search must be in the format 123-123-4444, 1231234444, or the last 4 digits (e.g., *4444*).

2. Scroll through the search results to identify the correct household record. Keep in mind that each record can be expanded using the + and - icon to the left of the name to view additional household info, such as Alt. ID #, full address, household size, proxy, preferred language, and notes.

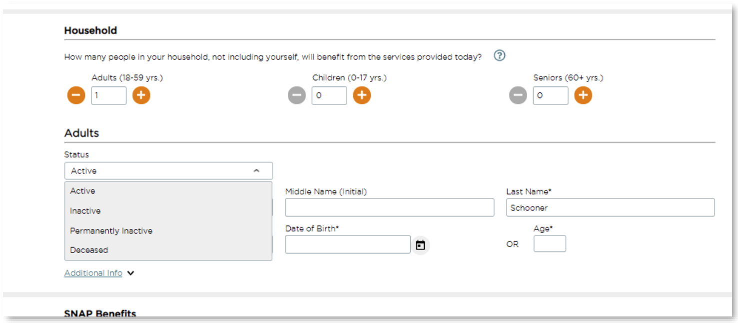


3. Click **Add Visit** next to the household's name to start a return visit.

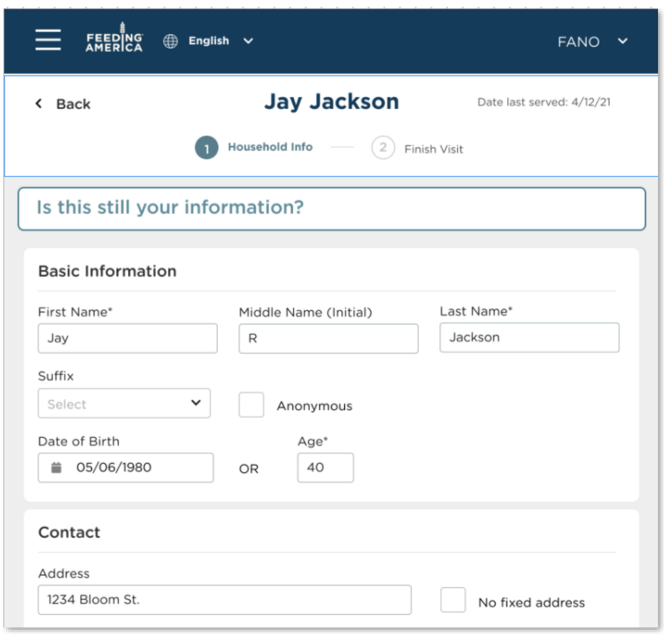
4. Choose the **primary service(s)** the neighbor is receiving. This will inform the intake form you complete with the neighbor. If your agency only has one primary service at an event, you will still need to select that service. Click **Next** to see the neighbor's household profile.



5. On the top of the **Household Info** screen, you will see **"Is this still your information?"** Review the neighbor's information with them. We recommend confirming that their basic information hasn't changed: address, phone number, email address, and household size/members.
   a. If a specific household member is no longer in the household you can change that specific household members status.
      i. Active (default): A member of the household who will benefit from the services provided today and counts toward household size.
      ii. Inactive: Still a member of the household, but will not benefit from the services provided today and does not count toward household size.
      iii. Permanently Inactive: No longer a member of the household and does not count toward household size.
      iv. Deceased: Is deceased and does not count toward household size.



6. If any of the neighbor's information has changed, edit their profile directly. A record of their previous responses will be saved in the Household Visit History.



7. If the neighbor's profile information was previously gathered using a different intake form or at a different agency, there may be some blank questions on your intake form. Ask these questions to the neighbor now.

8. You can add a new **Note** to the neighbor's profile to document their experience, needs, preferences, follow-up items, etc. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.

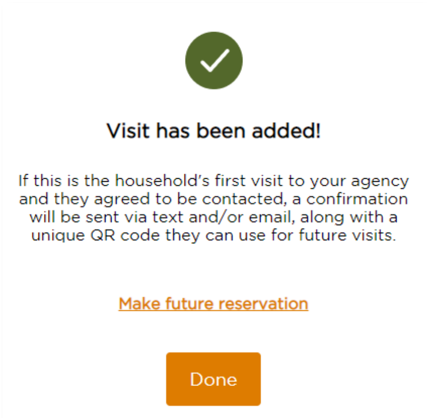
9. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.

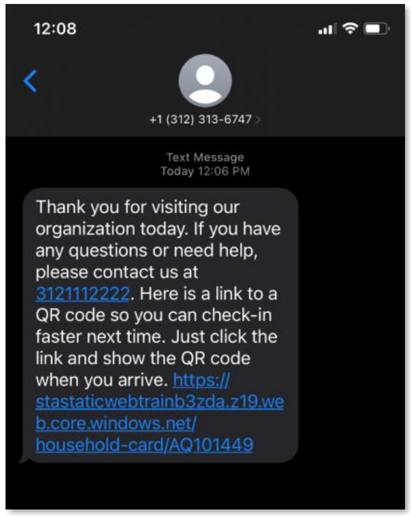
10. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.
    - **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
    - **Add Additional Services to Visit**: select any additional services provided to the neighbor; this list is pre-set for each event.
    - **Data Sharing with Third Parties:** this will have been selected at the neighbor's first visit You do <u>not</u> need to ask again.
    - **Print or Add Card:** Neighbors can have multiple barcode cards associated with their account. A barcode card can be used to make return visits a simple one-step process.
        a. **If the neighbor lost their existing barcode card or never had one,** choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
        b. **If the neighbor would like to link an external barcode card to their account** (such as a grocery store shopper card, library card, choose **Enter or Scan Barcode.** You can either type in the barcode ID numbers or click on the barcode icon to scan the barcode with your device's camera or barcode scanner.

      A barcode card can be used at any agency using the system.

11. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will <u>only</u> be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).

12. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.



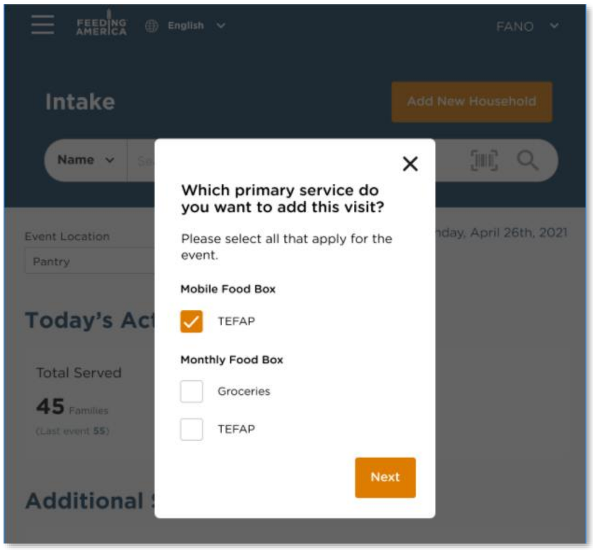


At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

Add a Return Visit (TEFAP)

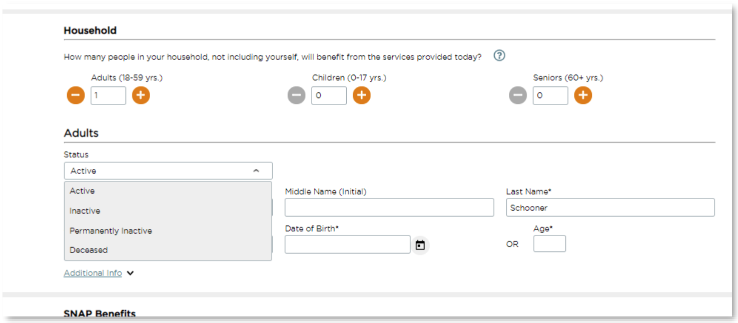
A **Return Visit** allows you to record a visit for a neighbor or household that already exists in the system. This will create a visit history for the household and is critical for reducing duplicates in the system.

1. To begin, follow steps 1-3 in the Add a Return Visit section.
2. Choose the **primary service(s)** the neighbor is receiving. For a TEFAP visit, the primary service must be a TEFAP service so that the TEFAP **intake form** is activated. If your program location only has one primary service at an event, you will still need to select that service. Click **Next** to begin adding the neighbor's household information.



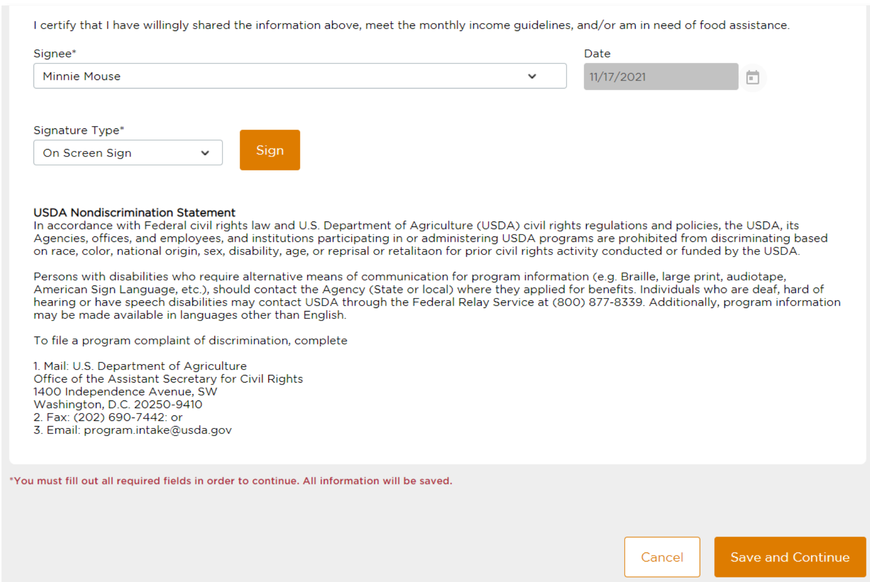
3. On the top of the **Eligibility** screen, you will see **"Has any of your information changed?"**.

4. Review the neighbor's information with them. If any of the neighbor's information has changed, it may impact their eligibility for TEFAP, so it is important to review everything. Edit the neighbor's profile directly if anything has changed. A record of their previous responses will be saved in the Household Visit History.
   - If a specific household member is no longer in the household you can change that specific household members status.
     i. Active (default): A member of the household who will benefit from the services provided today and counts toward household size.
     ii. Inactive: Still a member of the ~~household, but~~household but will not benefit from the services provided today and does not count toward household size.
     iii. Permanently Inactive: No longer a member of the household and does not count toward household size.
     iv. Deceased: Is deceased and does not count toward household size.



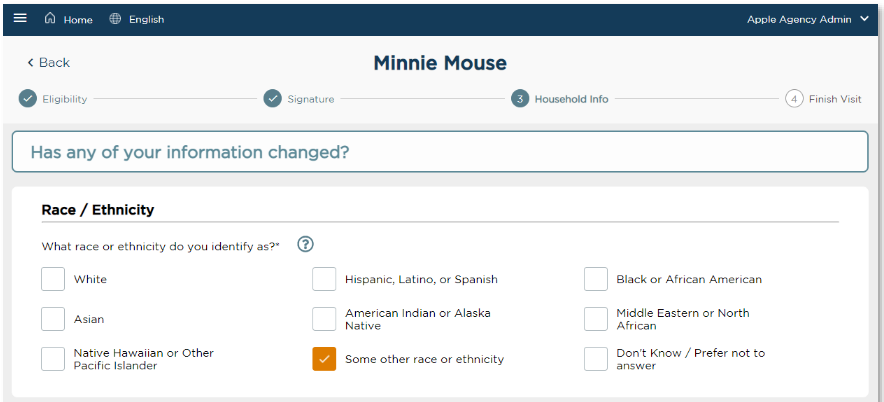
5. Once you confirm that the neighbor is eligible for TEFAP, click **Save and Continue**. If you choose to **Cancel**, all information entered will be lost.

6. You will be taken to the **Signature** screen. Depending on your state regulations, the neighbor may need to sign at every return TEFAP visit, not just the first visit.
   - You will first see a recap of the neighbor’s eligibility information: name, contact, address, household size, and income limit. Please confirm that this is correct.
   - **Signee*:** Select the person who is there in-person to pick up the TEFAP food. The drop-down list will display all active household members over 18 years old along with any proxies.
   - **Signature Type*:** Select the neighbor’s preferred signature method. The drop-down list will display all accepted signature types for TEFAP in your state.



7. Once you collect the neighbor's signature, click **Save and Continue**. If you choose to **Cancel**, all information entered will be lost.

8. On the top of the **Household Info** screen, you will see **"Has any of your information changed?"**. Review the neighbor's additional information with them. If anything has changed, edit their profile directly. A record of their previous responses will be saved in the Household Visit History.



9. If the neighbor's profile information was previously gathered using a different intake form or at a different agency, there may be some blank questions on your intake form. Ask these questions to the neighbor now.

10. You can add a new **Note** to the neighbor's profile to document their experience, needs, preferences, follow-up items, etc. Past notes will display as view-only in chronological order. By checking **Mark this note as private**, the note will only be shown to users at your agency.

11. Click **Save and Continue** to move on to the Finish Visit screen. If you choose to **Cancel**, all information entered will be lost.

12. You will then move to the **Finish Visit** screen and will go through the final steps to complete intake.
    - **Primary Services Provided:** this confirms the primary service you selected at the beginning of intake; you cannot change this selection.
    - **Add Additional Services to Visit**: select any additional services provided to the neighbor; this list is pre-set for each event.
    - **Print or Add Card:** Neighbors can have multiple barcode cards associated with their account. A barcode card can be used to make return visits a simple one-step process.
        a. **If the neighbor lost their existing barcode card or never had one,** choose **Print New Card** to create a new card in the system that you can print and give to the neighbor.
        b. **If the neighbor would like to link an external barcode card to their account** (such as a grocery store shopper card, library card, choose **Enter or Scan Barcode.** You can either type in the barcode ID numbers or click on the barcode icon to scan the

barcode with your device's camera (if your device supports this functionality) or barcode scanner. A barcode card can be used at any agency using the system.

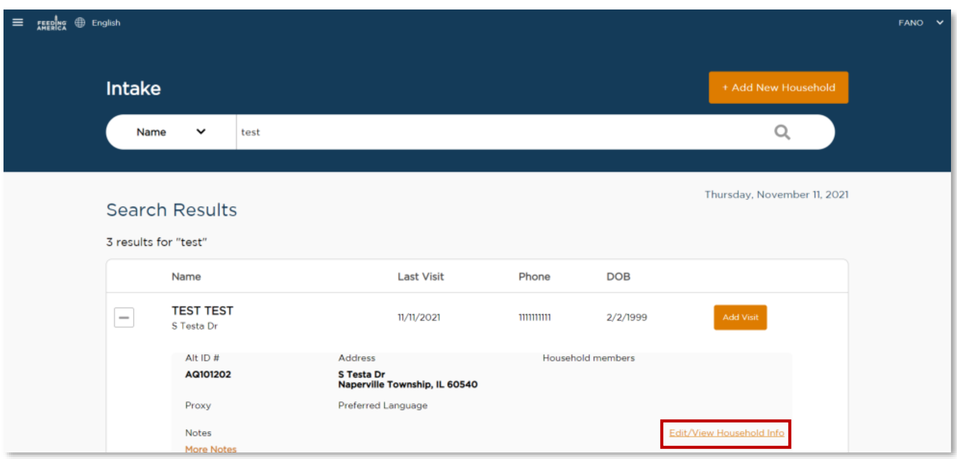
13. Click **Finish** to complete the visit and save all information. A pop-up will appear confirming that the visit has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).

14. Click **Make future reservation** to be taken to reservation screen (see Add Reservation Section) or Click **Done** to return to the home screen.

At any point during intake, you can go back to a previous screen by clicking the **Back** button on the top left of the screen. You can also cancel a visit by clicking **Cancel** on the bottom right of the screen; all information entered will be lost.

Edit/View Household Info

You may need to edit or view a household's full profile outside of an event or without recording a visit. You can do so with the **Edit/View Household Info** feature.

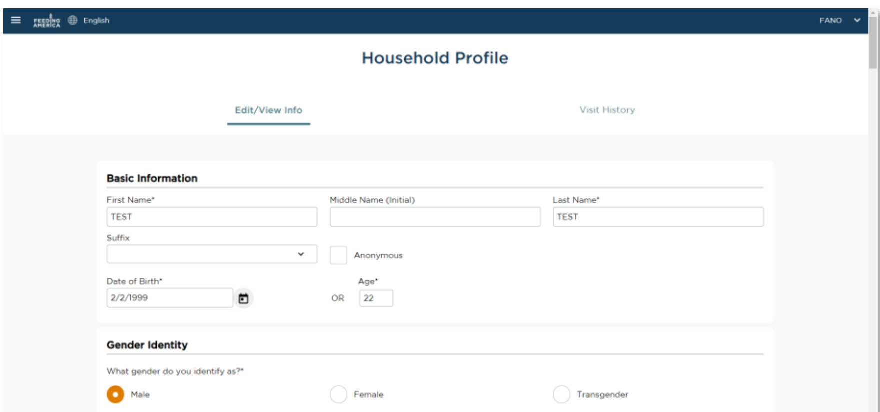


1. From the home screen, search the system for a neighbor's household profile. The search bar is located at the top of the screen. You can search the system for a neighbor's profile by:

- Alt. ID
- Address
- Date of Birth
- Name
- Phone #

2. Once you identify the correct household record, expand the record using the + and - icon to the left of the name.

3. Click **Edit/View Household Info**.



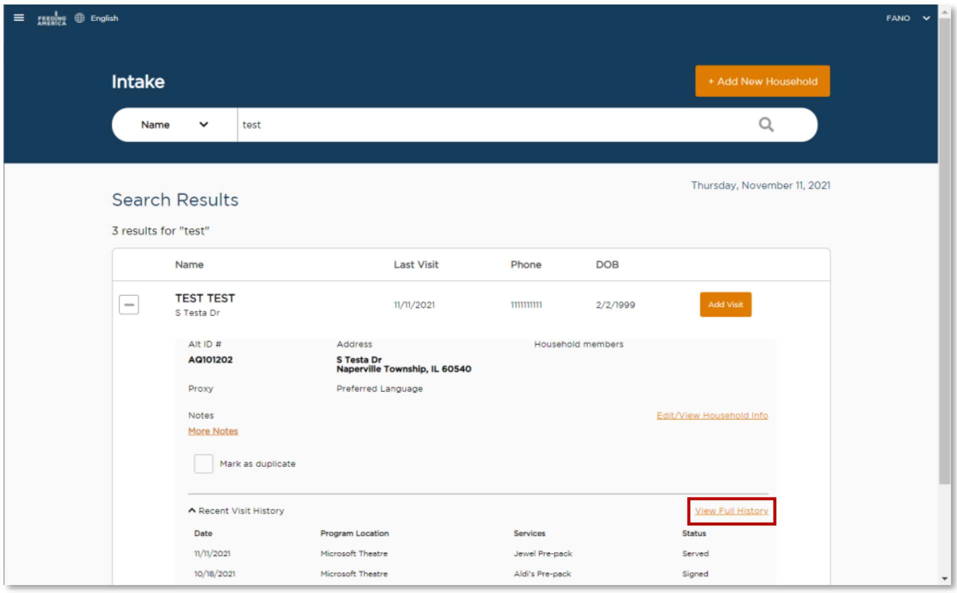
4. The neighbor's full household profile will be available for you to edit or view. Note that this is the neighbor's most recent profile information; to view profile information from a specific past visit, you will need to do so through Household Visit History.

5. If you make any changes, you must click **Save** at the bottom of the screen. You can also **Cancel** at the bottom of the screen; any changes you make will be lost.

Household Visit History

You may need to view a household's visit history to confirm receipt of past services or to cancel an incorrect past visit record. You can do so with the **Household Visit History** feature.

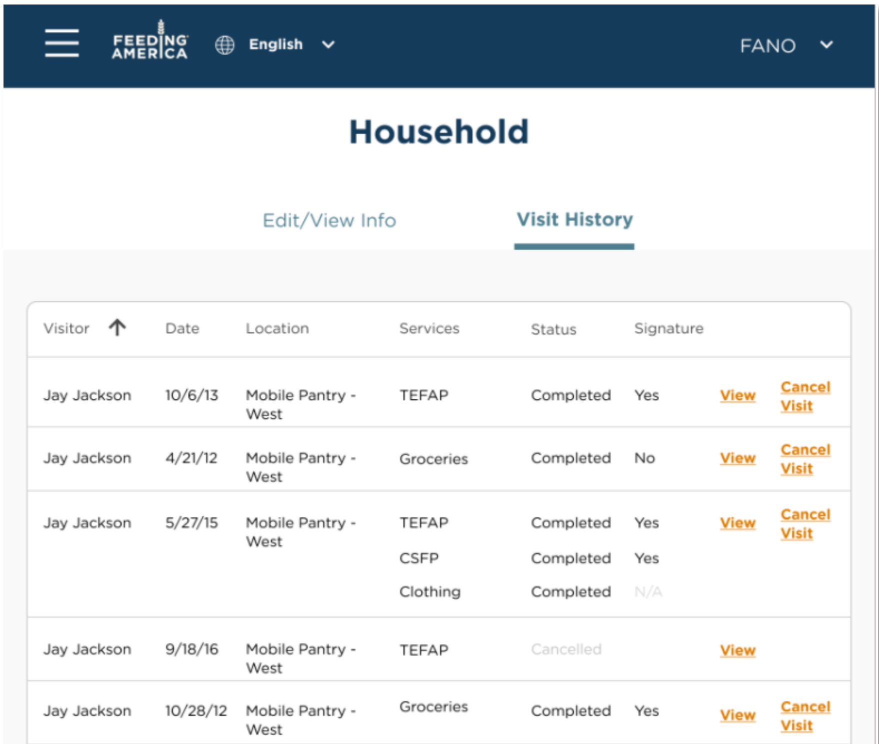
Note: household visit history is only visible to users of the same agency that served the neighbor unless your food bank administrator chose to make neighbor history visible to other agencies in *their network at the time of agency set-up. Thus, you may only see a neighbor's partial visit history, depending on other agencies' privacy settings.*



1. From the home screen, search the system for a neighbor's household profile. The search bar is located at the top of the screen. You can search the system for a neighbor's profile by:
   - Alt. ID
   - Address
   - Date of Birth
   - Name
   - Phone #

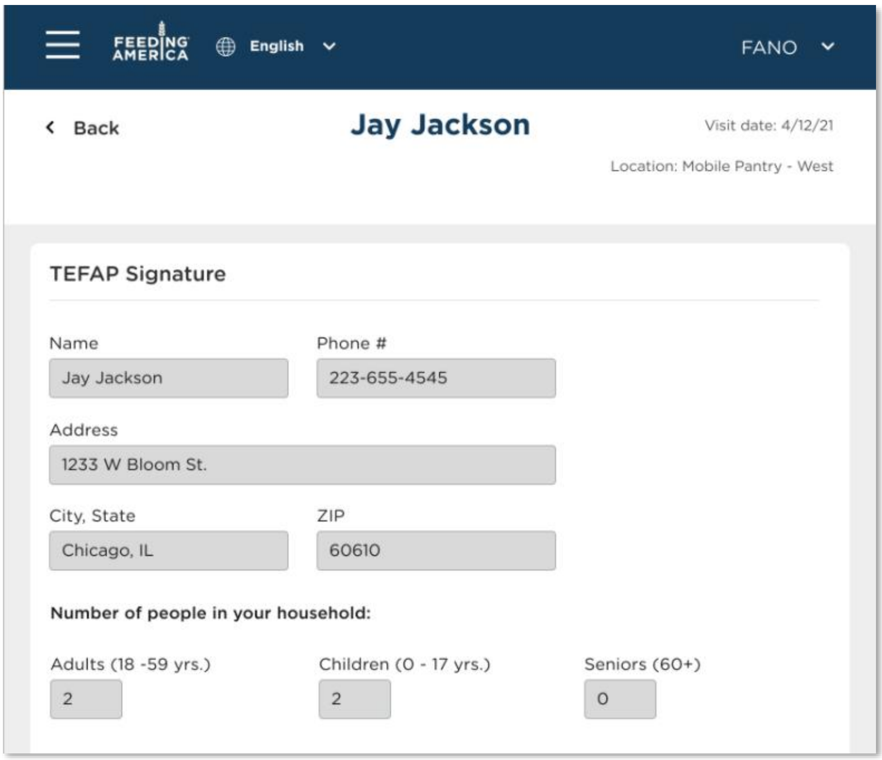
2. Once you identify the correct household record, expand the record using the + and - icon to the left of the name.

3. Click **View Full History**.

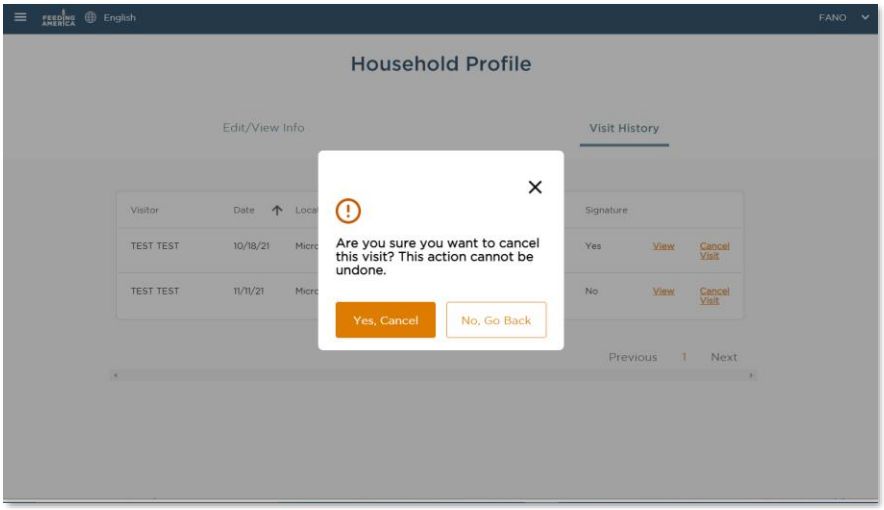


4. The neighbor's visit history will appear, displaying the following information. Each column is sortable in alphabetical or reverse alphabetical order; click on the column title to sort by that column.
   - **Visitor:** the household member who completed the visit that date.
   - **Date:** the date the visit was recorded.
   - **Location:** the program location where the visit was recorded.
   - **Services:** the primary services received during the visit
   - **Status:** whether the visit was completed or cancelled.
   - **Signature:**
     - **Yes:** a signature was given for a regulated service, such as TEFAP
     - **No:** a signature is missing for a regulated service, such as TEFAP
     - **N/A:** A signature was not needed because the visit was for an unregulated service, such as groceries.

5. To view a service record for a specific past visit, click **View**. This information cannot be edited. When you are finished, click **Done** at the bottom of the screen.



6. You can also cancel a past visit. From the full Visit History page, click **Cancel Visit** next to the specific visit you wish to cancel. A warning will pop up asking you to confirm that you wish to cancel the visit. *This cannot be undone.*



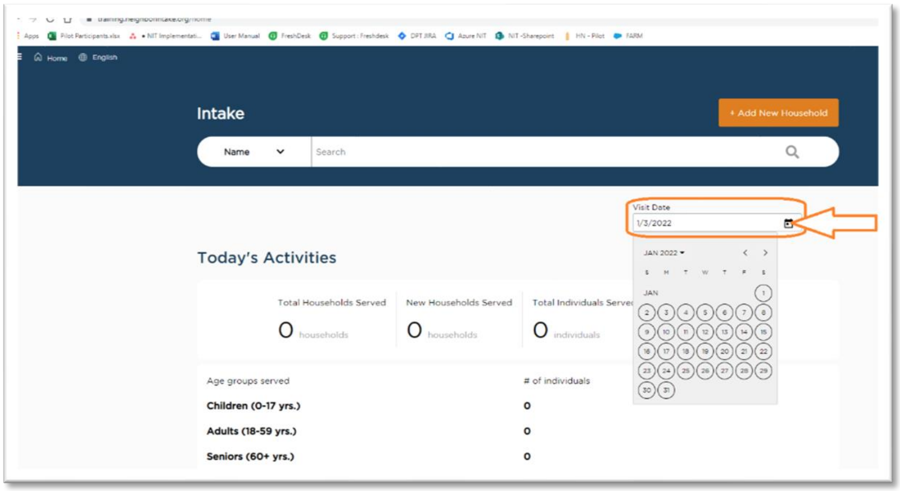
7. When you are finished viewing a household's visit history, click the **home button** on the top left to return to the Home Screen.

Add a Back-Dated Visit

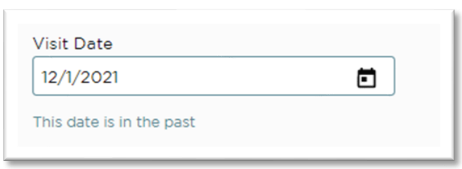
You may need to add a household visit after it occurs. For example, if you collected some paper intake forms during an event and waited until the next day to log them into the system. This visit can be for a new or returning neighbor. This visit can also be for a TEFAP service or any other service. Be sure to add the correct visit date, event, and service type(s) as this is critical for reporting and your audit.

1. If the past Event has not yet been created, you will need to do that first.

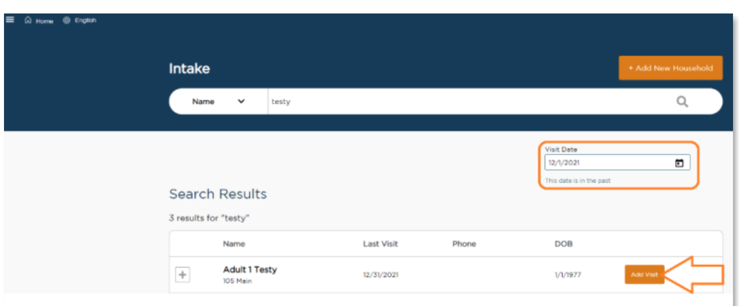
2. From the home page, **change the "Visit Date"** on the calendar to the date of the past event.



Once the date has been changed you will see a notification that "This date is in the past."



3. **Search for or add your new neighbor** (see "Add New Household" or "Add Return Visit" sections for more details.)



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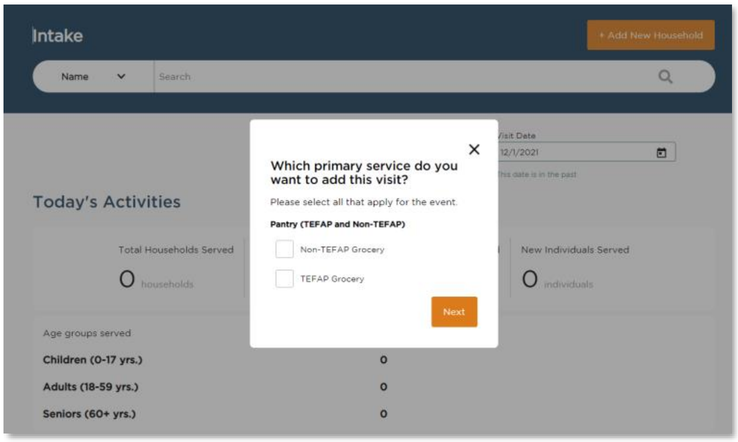
4. **Select your primary service(s)** (if a service is not available to you, check your Event configurations to make sure the event was set up for the visit date you have selected.)



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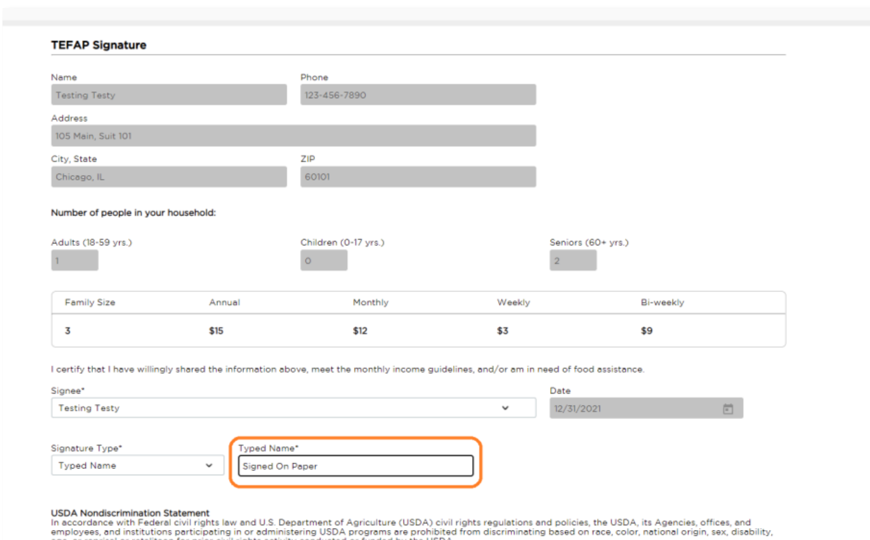
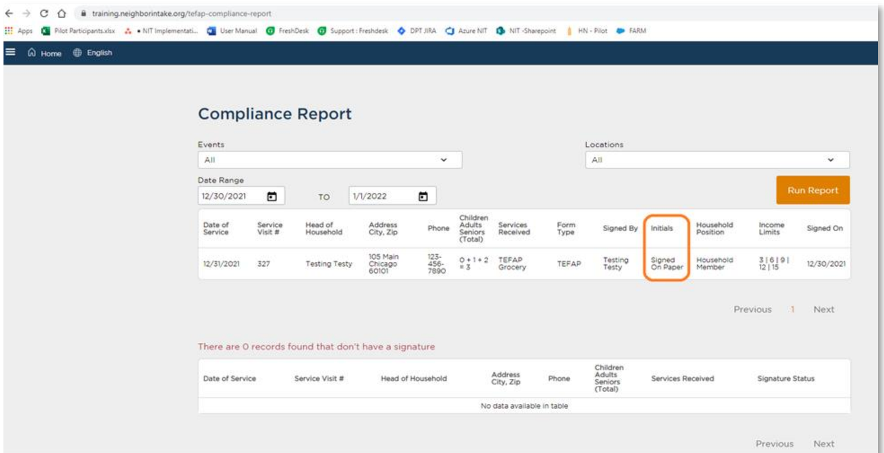
5. **Add the Visit**. (see "Add New Household" or "Add Return Visit" sections for more details.) If it is a TEFAP visit, select "Typed Name" as the Signature Type and type "Signed on Paper" in the Typed Name box. Retain your paper form, as this is required for your TEFAP audit.



In your compliance report, the captured TEFAP signature will display as "Signed on Paper." This will alert you and your regulator that the paper copy of the form is the official copy.



6. When you have finished adding any past visits, be sure to change the date back to today on the calendar.

Ad Hoc Event Creation

If an event does not already exist on a day you are trying to serve neighbors, you may need to quickly create a new, ad hoc event. This should only be used in unpredicted circumstances and should not replace normal event creation through the Admin Settings section.

1. From the home page, scroll down to the “Events Today” section and click on the link that says **Don’t see the event you need? + Add New**

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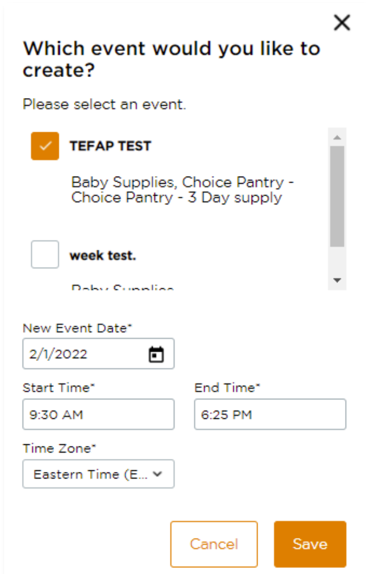
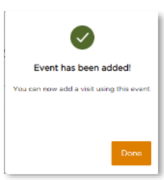
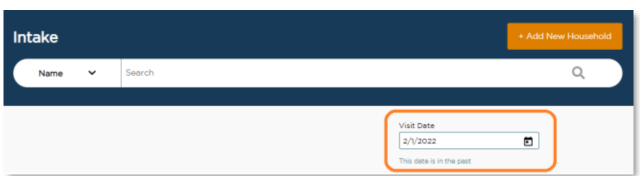
2. From the pop-up window choose a **template event** (these are events that were previously created through the Admin Settings section), a new **date** (this will likely be

today's date but could also be a date in the past if you're adding a back-dated visit), **start time, end time** and **time zone**. Click the **SAVE** button.

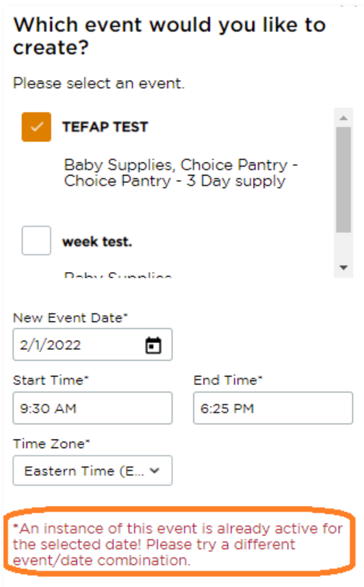


3. When your ad hoc event has been successfully created, you will receive a confirmation message. The home page will refresh, and you should now see your new event in the Events Today section. Note: if you created a back-dated event, the page will refresh and reset the visit date to the past date.





4. If the same event already exists on the selected date, you will get an error message and be asked to choose a different event and/or date.



RESERVATIONS

A reservation is a future-dated service visit that you schedule in advance. It is a placeholder to indicate a neighbor will be served at a specific event. Once an event is configured to accept reservations (see Events section).

1. To manage your reservations, **click on the Menu** on the top left of the home screen and select "**Reservations**".

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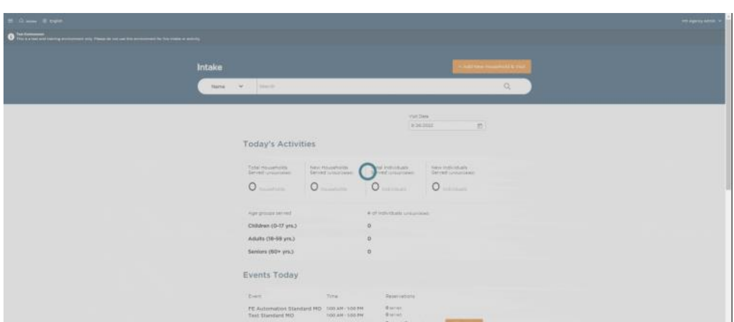
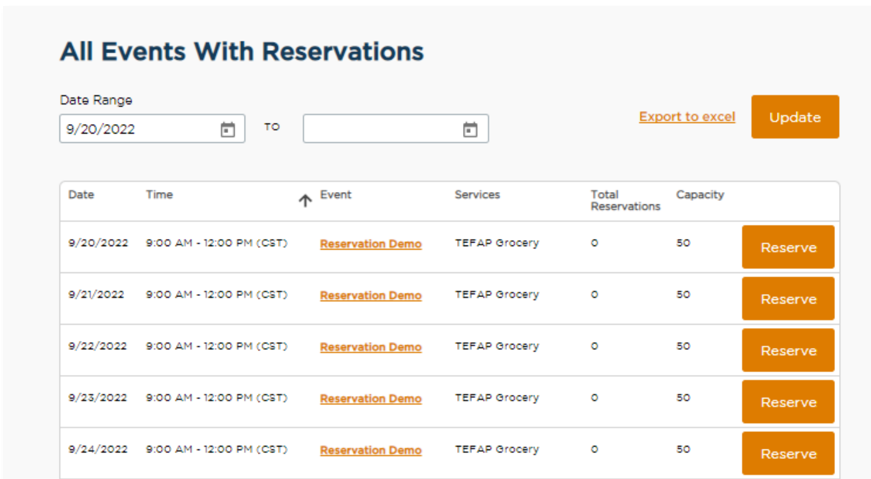


All Events with Reservations

This page will give you the ability to have a glance at all Events with the ability to take reservations. This ability was created during the Event set-up process (see the Reservations section in Admin for details). This table includes the date, time, event, services offered, total number of reservations made so far, max capacity of the event, and a Reserve Button.



Date	Time	Event	Services	Total Reservations	Capacity	
9/20/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/21/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/22/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/23/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve
9/24/2022	9:00 AM - 12:00 PM (CST)	Reservation Demo	TEFAP Grocery	0	50	Reserve

Tips for using this table

- You can alphabetically sort columns in this table by hovering over and clicking the column title. An up or down arrow will appear to the right of the column that is sorted.
- You can use the date range field to search for Events within a specific date range~~s~~.
- This list can be exported by clicking the **Export to excel** link.

Event Name

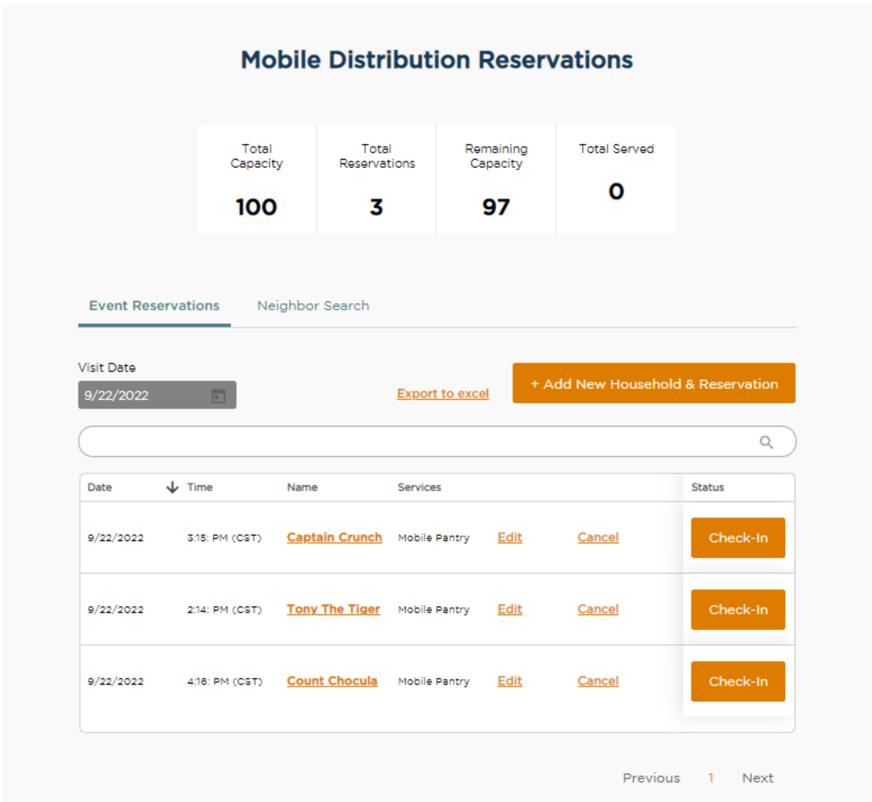
If you would like to look at the event details for a specific date, click on the event name. This will open a list of that day's reservations for that event.

Reserve Button

If you would like to make a reservation for a neighbor to a specific event, click the reserve button next to the event. This will take you to a screen that will allow you to search for a specific neighbor. If the neighbor is not in the system, you can also add a new household and make them a reservation.

Check-In List

The check-in list will serve as the primary way to review the upcoming reservations for an event. From here you can review the details of the events, manage reservations, and serve neighbors who have made reservations.



Capacity

This table at the top of the page shows the capacity for the event you've selected (if the event is recurring, the capacity is for the specific date you selected).

- Total Capacity – This is the max number of reservations accepted at this event
- Total Reservations – The current number of reservations made
- Remaining Capacity – The number of reservation spots still available
- Total Served – The number of reservations that have been served

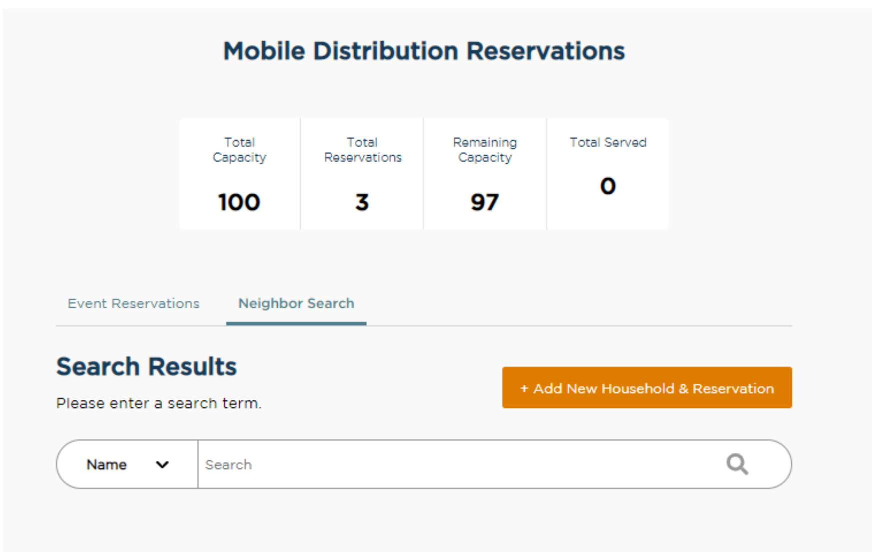
Event Reservations

Click on the "Event Reservations" tab below Capacity to view a list of reservations for the event you've selected (if the event is recurring, the list is for the specific date you selected). You can export this list to excel. You can also add a new household and reservation. Using the search bar on this screen will search for a neighbor already on the list.

- Click on the neighbor's name to be taken to that neighbor's edit/view profile.
- Click "Edit" to edit the reservation.
- Click "Cancel" to cancel the reservation.
- Click "Check-In" on the date of the event to serve the neighbor. This will route you into the returning neighbor intake flow.

Neighbor Search

Click on the "Neighbor Search" tab below Capacity to view a screen that will allow you to search for a specific neighbor to add a reservation for that neighbor. If the neighbor is not in the system, you can also add a new household and make their reservation.



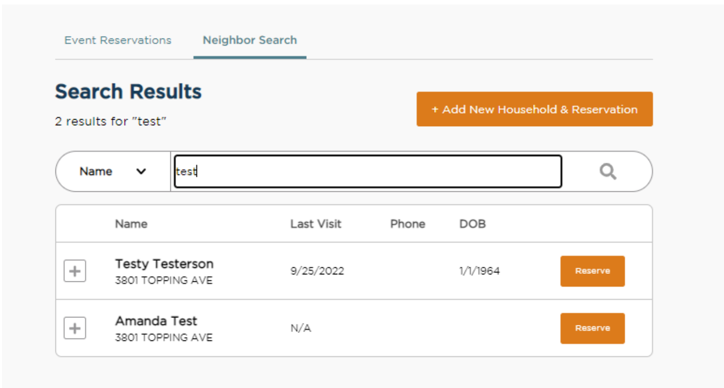
Add New Reservation

Search

This search box works the same as the search box on the home screen (See Search Section). This search will show neighbors who are already in the system.

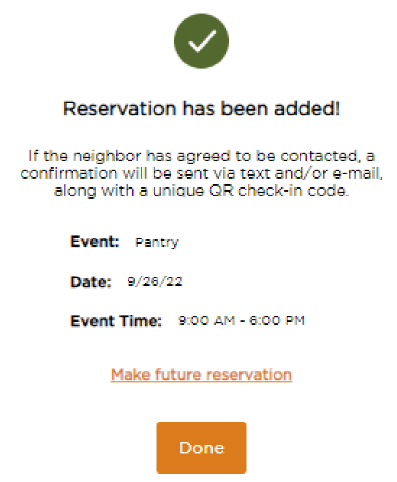
1. **Search** for a neighbor

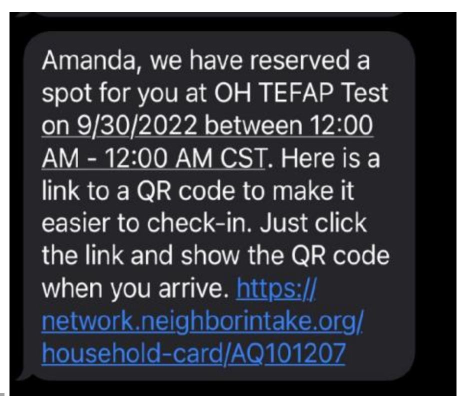
2. Click the **"Reserve"** button



3. Select **Primary Service** and click **Next**.

4. A pop-up will appear confirming that the reservation has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will be sent to neighbor each time a reservation is made.



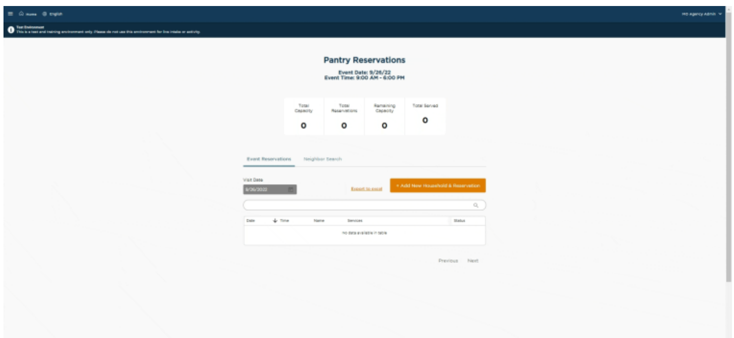


Add a New Household & Reservation

If a neighbor is not in the system, you can add them and make a reservation at the same time. **Always search for a neighbor before creating a new one to prevent duplicates in the system.**

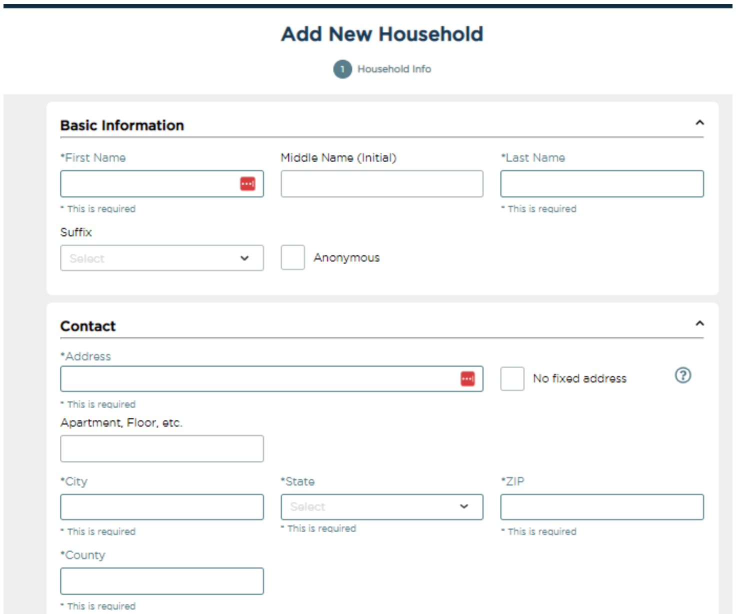
1. **Click the Add New Household & Reservation** button

2. Select **Primary Service** and click **Next**

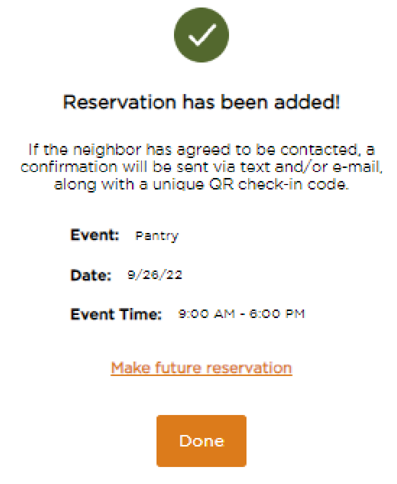


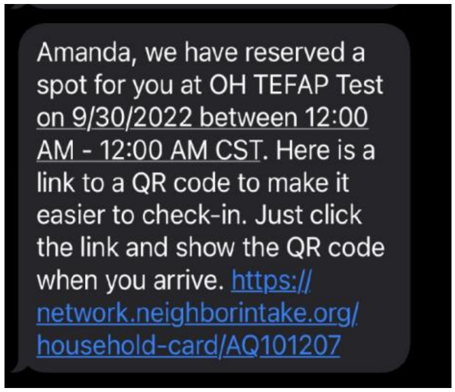
3. Reservations will only have one page of questions about the neighbor. It will have the same required questions if you were serving a neighbor today, however you will not finish the visit. To view more information about the required questions see Add a New

Household or Add a New Household (TEFAP).



4. Click **Finish** to make the reservation and save all information. A pop-up will appear confirming that the reservation has been added. A confirmation text or email will also be sent to the neighbor if they selected **Ok to contact** when they provided their email address or phone number on the Household Info screen. The Agency Main Location's phone number will be used as the contact number in the follow-up text/email. A text/email will be sent to neighbor each time a reservation is made.

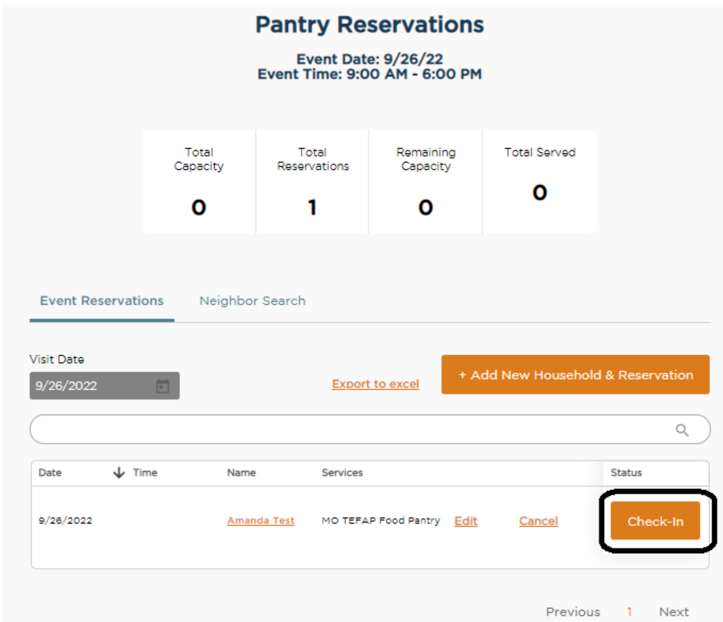




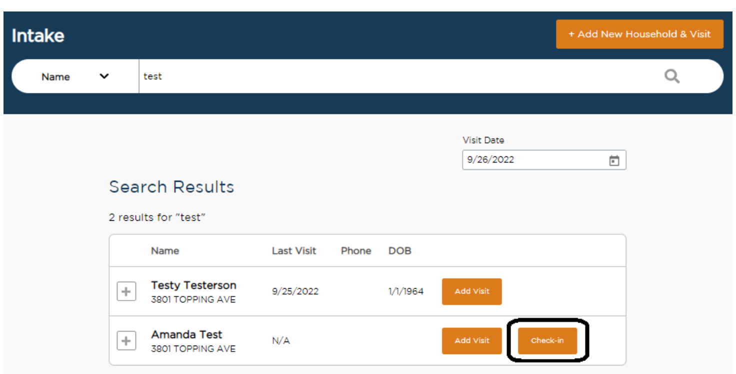
Serve a Reservation

A reservation can be served two ways. The first is to use the Check-In List. This is ideal for large distributions in which all neighbors will have a reservation. The second is to use the search from the home page. This is ideal for distributions in which some, but not all, neighbors will have a reservation.

1. From the **Check-In List.** The check-in list will display the reservations that are ready to be completed. The Button will change from "Reserve" to "Check-In". **Click the "Check-In" button to be routed through the returning neighbor flow.** (See Add a Return Visit and Add a Return Visit (TEFAP).)



2. From the home screen search for a neighbor. If the neighbor has a reservation a "Check-In" Button will display. **Click the "Check-In" Button to be routed through the returning neighbor flow**. You may also see an "Add Visit" button if there are multiple events for today. (See Add a Return Visit and Add a Return Visit (TEFAP).)



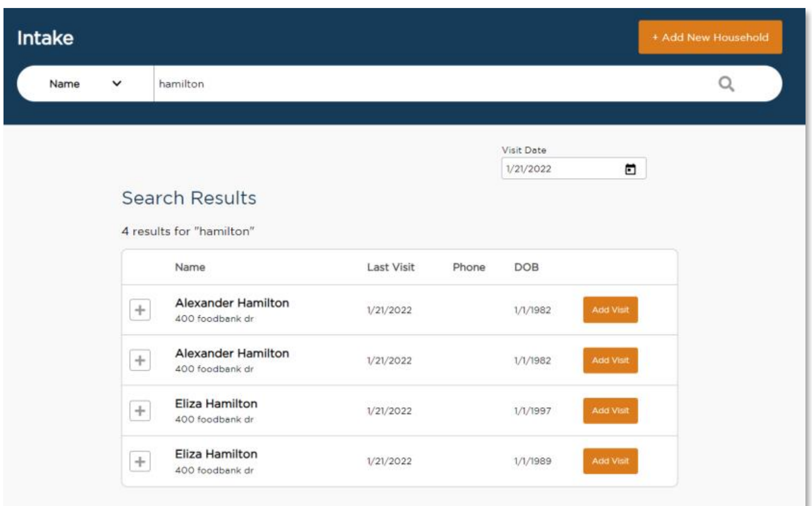
Duplicate Management

At times it will be necessary to identify and merge two duplicated households. The system will attempt to identify duplicates every five minutes. Any households with a match rating of 30% or higher will be placed in a queue to be managed. The system is not perfect and will likely not identify 100% of true duplicates. Therefore, it is critical that food bank and agency administrators and staff are trained to monitor for duplicates regularly.

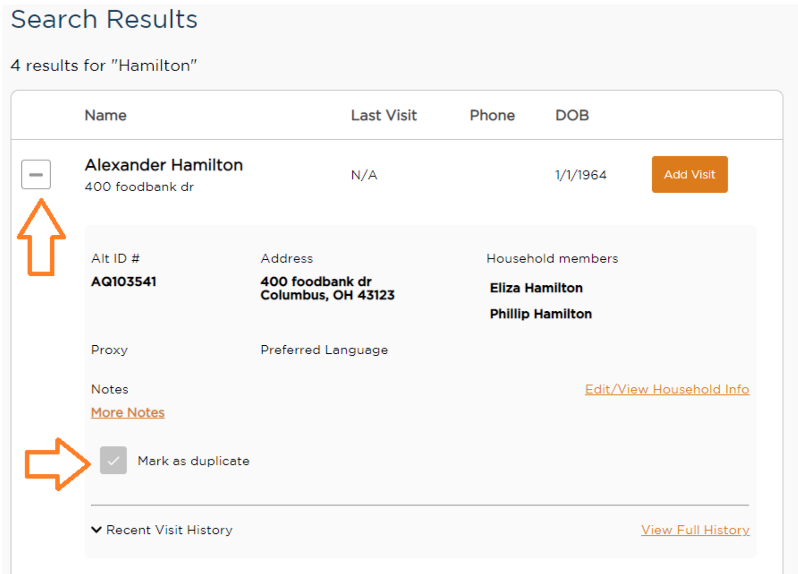
Identify a Duplicated Household During Intake

During the intake process, it is possible that you may come across a household that is an obvious duplicate of another household. You can help identify these households as potential duplicates and add them to the queue to be resolved.

1. **Search for a household**



2. **Click the +** to expand the family Information

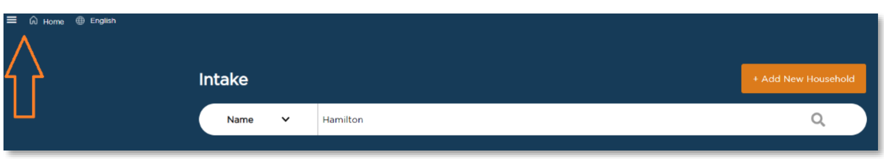


3. Click the box to "Mark as duplicate."
4. The household will be placed in the duplicate queue for review by a user with permission to manage duplicates. Refer to the User section to review these permissions. Note: the flagged household will still appear in Search and the "Mark as duplicate" check box will still be available to check until the potential duplicate household has been reviewed by admin.

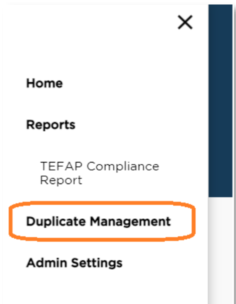
Manage (Merge or Dismiss) a Duplicated Household

Both food bank and agency users with the correct permissions can manage duplicate households that have been automatically flagged by the system automatically or manually flagged by users during intake. In Duplicate Management, you can either merge flagged households or dismiss the proposed duplicate as not a true duplicate.

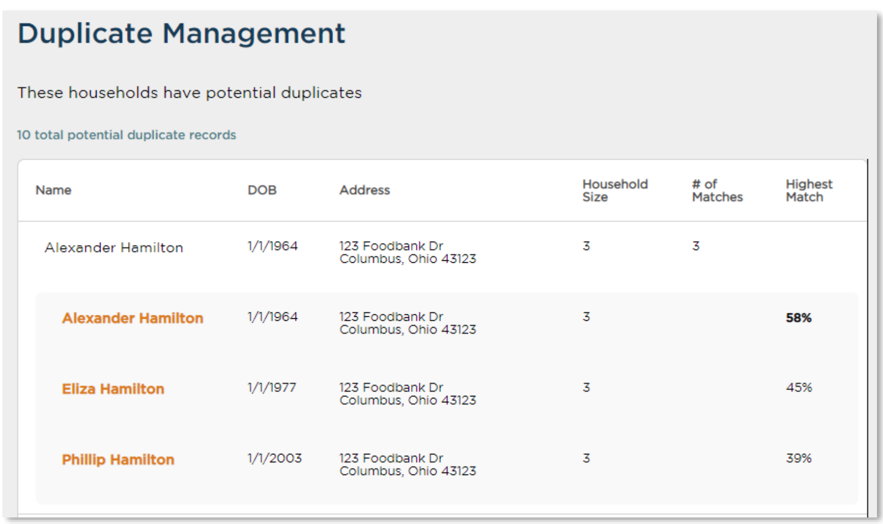
2. To find the list of duplicate households, Click on the Menu on the top left of the home screen.



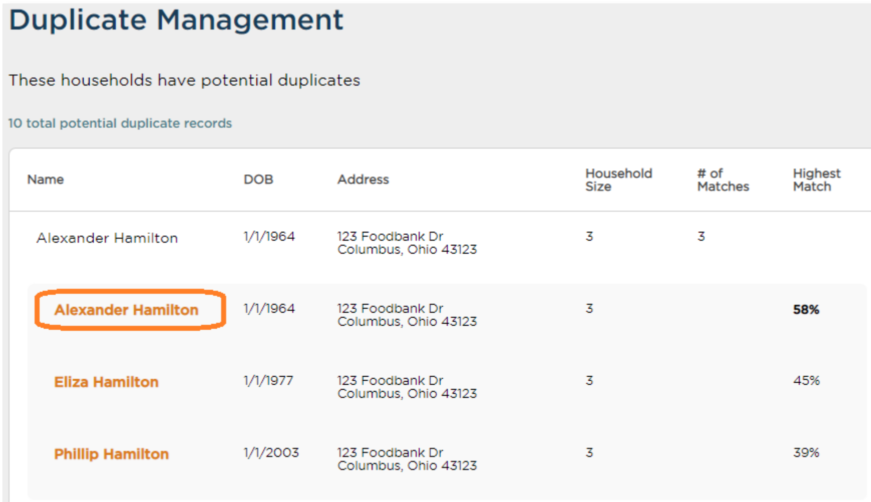
3. Click on the "**Duplicate Management**" section.



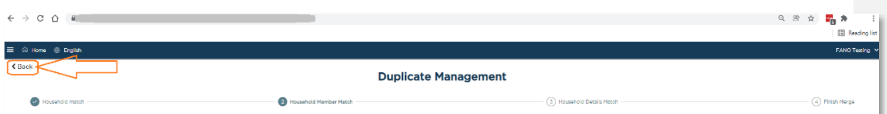
4. A list of potential duplicates will open. Each name represents a household. In this list you will see the Head of Household Name, Date of Birth (DOB), Household address, Household size, the number of potential duplicates, and the percentage that each duplicate matches to the primary household. You can reorder the list of duplicates by Name, Number of Matches and Highest Match by clicking on those column headers. Each group of matches will be default ordered by highest percent match.



5. **Click on the orange name** of one of the potential duplicates.



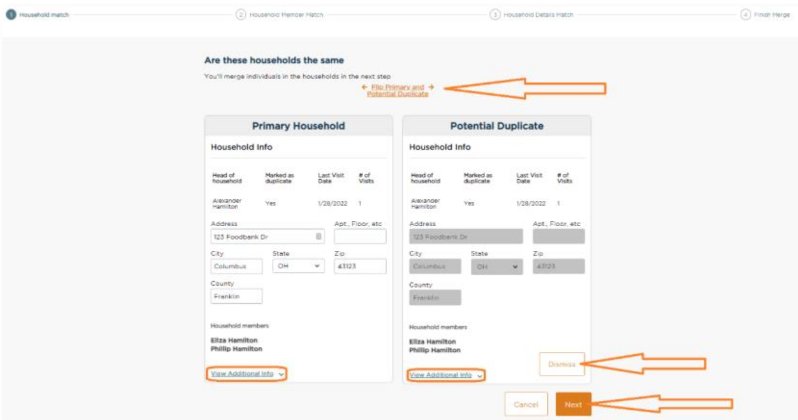
6. This will open a new screen that has 4 steps to manage the duplicate household. Anytime during this process that you need to return to the previous screen use the Back button inside the application, NOT your browser's back button.



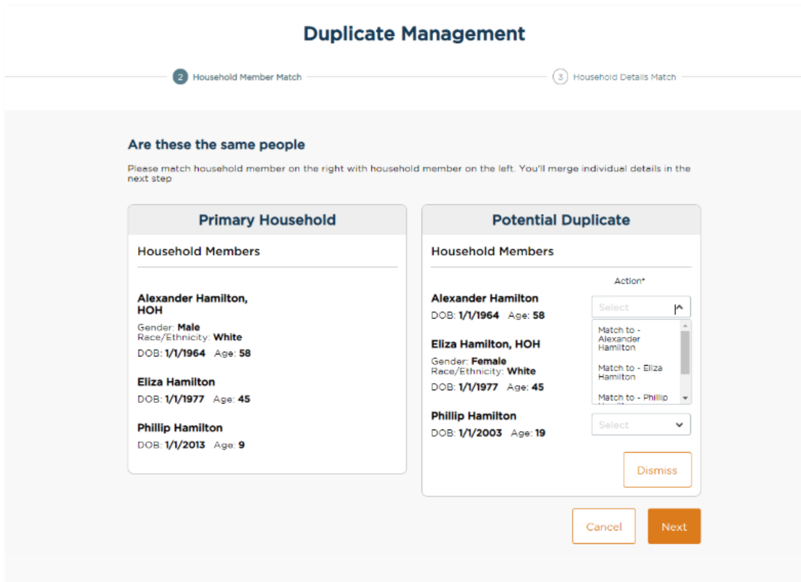
a. Household match – Are these households the same?
   On this first screen you will determine if the households are the same and, if so, which household to keep as the "primary record." The household on the left will automatically be kept as the primary record. If the household record on the right is more complete and you need to switch the records use the "Flip Primary and Potential Duplicate" button. If you need more information, you can use the "view additional info" button to expand the household information.

   If you determine that these records are <u>not</u> duplicates you can click the Dismiss button which will remove the duplicate flag.

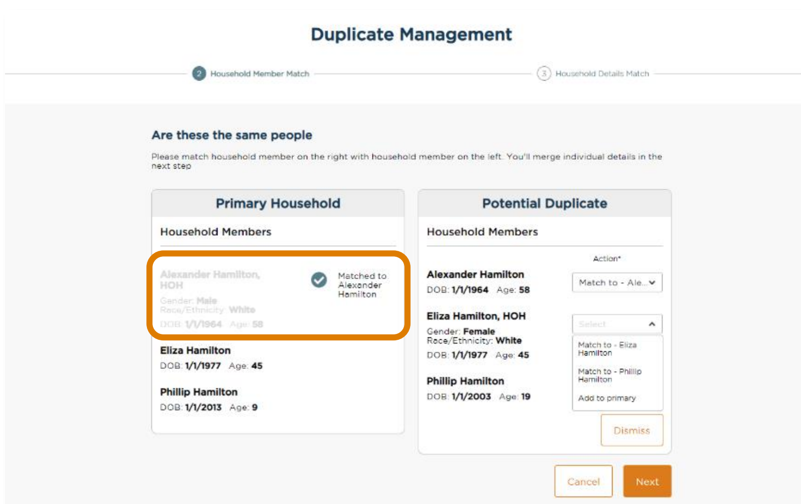
   Once you have determined that these households are duplicates and that you have your primary household correctly selected, click the Next button.



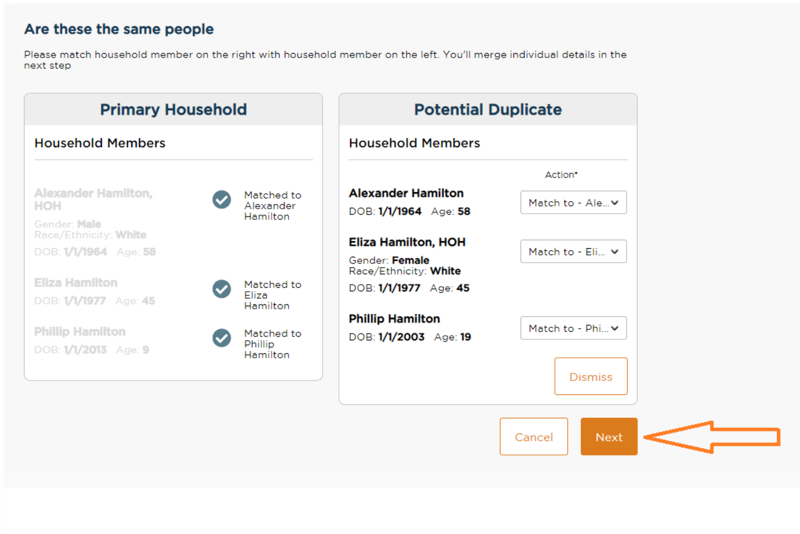
b. Household Member Match – Are these the same people?
In this second step you will complete a one-to-one match for each household member. On the right-hand side of the screen, you will see a drop-down menu of potential duplicated household members. **You will go through each member on the right and match them to a record or create a new family member in the household.**



Once you have matched a member you will see that that member is marked as matched and is no longer available to click on.



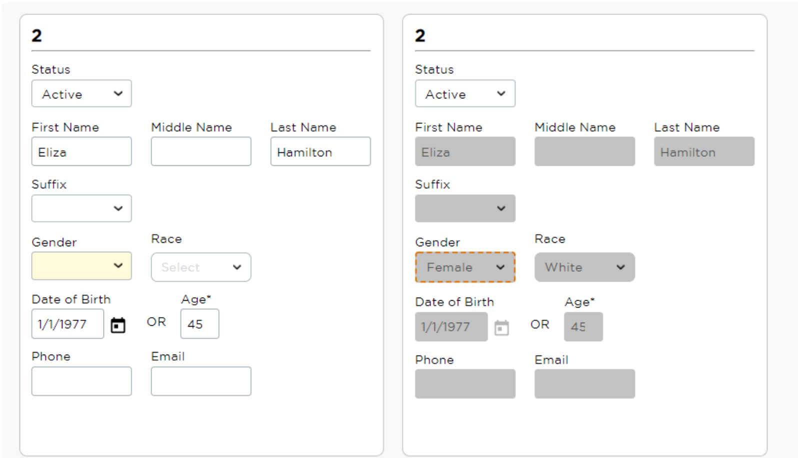
Complete this step for each member of the household and when done click the **Next** button.

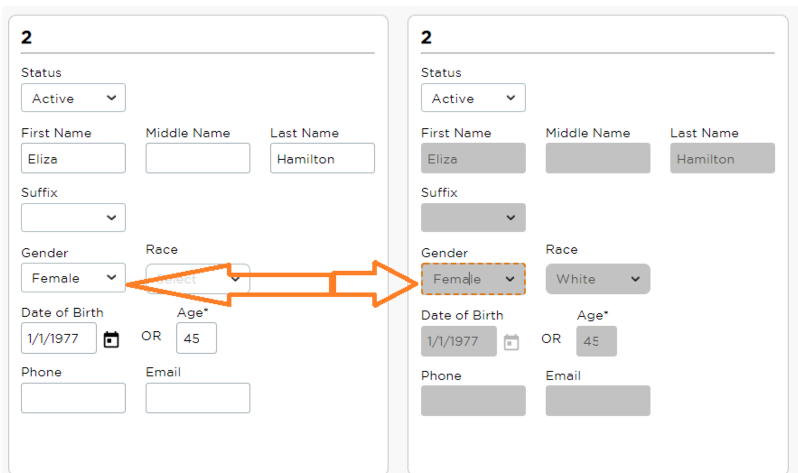


c. Household Details Match

For each household member there may be different information in each record. In this third step, you can complete each neighbor's profile details. You will see each household member’s details side by side. Information that does not match will be highlighted in yellow. Again, the record on the left is the information that will be kept.

To copy information from the right to the left you can simply hover over the box until the box has an orange dashed outline. Then click once on the box and it will automatically copy the information over to the profile on the left.

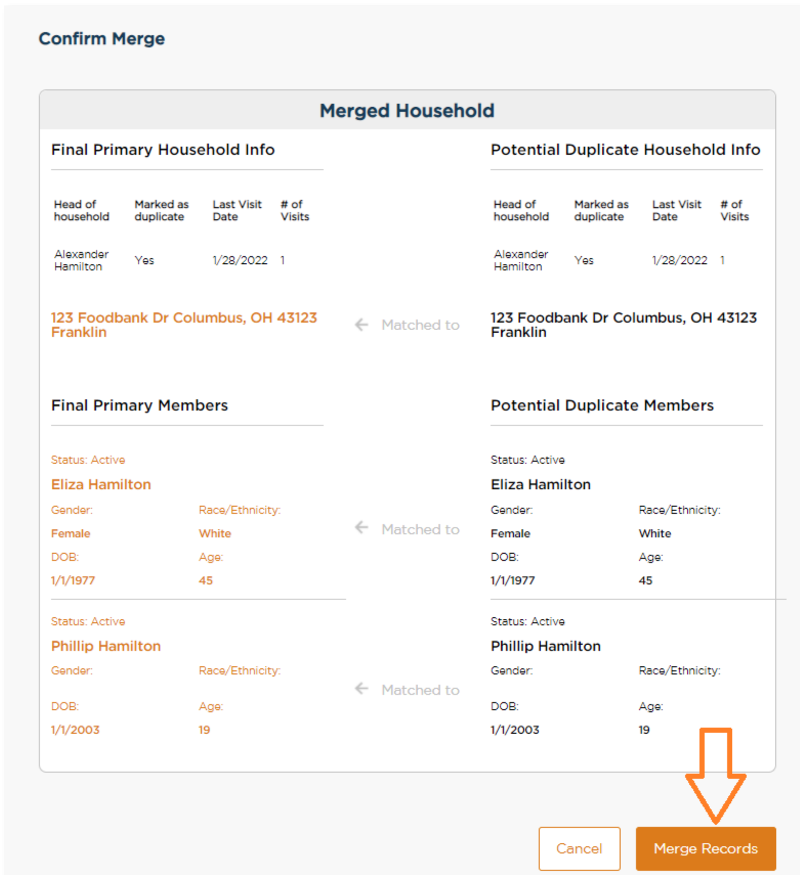




Do this for each household member. Then **click the Next button**.

d. **Finish Merge**

On this fourth and final screen, you will confirm that all your merged information for the household is correct. The information on the left side of the screen will be kept. When you have confirmed the information **click the Merge Records button**.



You will receive a popup to confirm your choice to merge. This cannot be undone. You will then receive confirmation that your records have been merged. Click the Done Button. You will be returned to the Duplicate Management screen where you can review additional potential duplicates.

Appendix

Version Releases & Bug Fixes

We employ an agile method of updating the software. We make regular small fixes and improvements, in addition to larger feature releases.

Compatible Devices and Browsers

Desktop / Laptop

- Mac
    - Google Chrome (up to date version)
    - Mozilla Firefox (up to date version)
    - Safari (up to date version)
- Windows
    - Google Chrome (up to date version)
    - Mozilla Firefox (up to date version)
    - *Device example: Samsung, Lenovo, or HP Chromebook*

Tablet

- iOS 10.3.4 or higher
    - Safari (up to date version)
    - Google Chrome (up to date version)
    - *Device example: iPad*
- Android 10 or higher
    - Google Chrome (up to date version)
    - *Device example: Samsung Galaxy Tab S7 Plus*
- Fire OS 7 or higher
    - Silk Browser (up to date version)
    - *Device example: Amazon Fire HD 8*

Mobile

- iOS 10.3.4 or higher
    - Safari (up to date)
    - Google Chrome (up to date version)
    - *Device example: iPhone*
- Android 10 or higher
    - Google Chrome (up to date version)
    - *Device example: Samsung Galaxy S21*

Other Devices

- Barcode scanner

- There are many peripheral barcode scanners that will connect to a desktop or laptop computer. Barcode scanners are not typically compatible with tablets or mobile devices, but the camera in those devices will work as a barcode scanner in this platform.
- *Device example: Fully Upgraded Wireless 2D QR Barcode Scanner with Stand, 3 in 1 Bluetooth & 2.4GHz Wireless & USB Wired Connection, Connect Smart Phone Tablet PC, Image Bar Code Reader with Vibration Alert by Tera (available on Amazon)*

Mobile Display

The Service Insights on MealConnect platform is fully mobile responsive. Every screen is optimized to function on devices of different sizes – laptops, tablets, and mobile phones. For example, mobile phone displays include: