Service Insights on MealConnect



OFFLINE MODE: PLANS

1. WHILE STILL ONLINE, select **Plans** from the Menu in the top left corner.

This will allow you to save data from returning neighbors on individual devices so you don't have to enter every neighbor as new.

	×	Online	
Home	î	t only. Please do not use this environment for live intake or activity.	
Reservations			+ Add New Household & Vis
Offline Mode			
Plans		Search	Q

2. From the Offline Plans screen, set the date range and click **Update**. Then click **Create New Plan**.

Select dates that will cover most of the neighbors you're likely to see, but not absolutely everyone. The most recent month is a good place to start.

lock your pla	e ready to go off n prior to downlo	ine and downlo ading	ad your plan, p	please confirm y	our selections and	lock your plan. You m
*Date Range						
3/1/2024	🖬 то	3/28/2024		late	Refresh	Create New Pla
Filter results b	y keyword					Q

3. Give your plan a name and click **Next**.

1 Plan Name	2 Plan Event	3 Plan Neighbors	(4) Summary
Name Offline Plan	aking data selections for offline usage		
Plan Name "Name of Plan April			Cancel Next

Offline Plan

4. Choose the upcoming **events** for which you will be using Offline Mode and click **Next** (scroll to the bottom of the page if necessary).

All Eve	ents Eligible	for Offline I	Mode				
Select an eve	nt to save to your device						
*Date Range							
3/28/2024	то	4/28/2024	Update				
Filter results by	y keyword					٩	
Date 🗸	, Time	Event	Services	Total Reservations	Capacity		
03/28/2024	7:00 AM - 5:00 PM (MST)	On the Road	Food Pantry - TEFAP, Food Pantry	0	20	Select	Which of your events will be using Offline
03/28/2024	9:00 AM - 4:00 PM (MST)	Food Pantry	Food Pantry	0	300	Select A	Mode? (Choose only one.)

5. Set Neighbor Selection Criteria and click Update Selected Counts. Click Next.

You can add multiple criteria here, or just choose one. Adjust criteria until the selected counts number looks close to the number of neighbors your pantry normally serves.

Neighbor Data Eligible for Offline Mode	Neighbor Selection Criteria	Here we added two
Select neighbor data to save to your device	Add Another Neighbor Selection Criteria	selection criteria: zip
Neighbor Selection Criteria selection criteria,	e •Neighbor Selection Criteria Neighbors in a specific zip code	code (you can add multiple zip codes) and paighbors proviously
Add Another Neighbor Selection Criteria which gives us //	-ZIP -ZIP 80908 80910	served.
*Neighbor Selection Criteria	Add Another Remove ZIP	These criteria give us 81 possible neighbors.
Neighbors previously served by this Agency		
*Date Range	*Neighbor Selection Criteria Neighbors previously served by this Agency	Feel free to play around
2/1/2024 То 3/28/2024	Date Range	with these selections until the numbers look right to
<u>Cli</u> ck button to display neighbor count (optional)	2///2024 r To 3/28/2024 r	you. Then click Next .
77 eighbors Selected by This Criteria Update Selected Counts Update Selected Counts If that number makes set for your pantry, click N to move on. If it seems I add a few more criterio	An a second second contract of the selected by This Criteria Update Selected Counts	Conco. Next

6. Verify the information and save your plan.

lan name	Please review and confirm the selections you have made		
	Food Pantry		
	Filter Selection(s)	Estimated Plan Neighbors	Doos this
	All Neighbors In Zip Code [80908, 80910]	4	info look
	All Neighbors Previously Served By This Agency [2/1/2024 - 3/28/2024]	77	right?
	81 Neighbors Selected by This Criteria		
		Cancel	re Plan

7. Lock your plan.

Offline	Plans									
When you are lock your plar	e ready to go offline a n prior to downloadir	and downl ng	oad your	plan, plea	se confirm y	our selections a	and lock you	ur plan. You mu	st	
*Date Range			(_	
3/28/2024	то 4/	/28/2024	=	Update	•	Refresh	Cre	eate New Plan		
Filter results b	y keyword							Q	\supset	
Event Date	Time of Event	Event	Plan Name	# of Times Loaded	Plan Neighbors	Plan Status				
3/28/2024	9:00 AM - 4:00 PM	Food Pantry	April	0	81	Open	View	Lock		

8. When the plan has finished processing, load your plan to your device.

Plans with higher numbers of neighbors will take longer to process.

Agency Admins only:

- a. Login to each device under your own login.
- b. Choose **Plans**.
- c. Click Load Plan to Device.

Offline Plans								
When you are ready to go o lock your plan prior to dowr	ffline and down loading	load you	ır plan, ple	ease confirm	n your selection	is and loci	k your plan. You must	
*Date Range								
3/28/2024 🖬 то	4/28/2024		Upda	te	Refres	sh	Create New Plan	
Filter results by keyword							٩	
Event Date Time of Event	Event	Plan Name	# of Times Loaded	Plan Neighbors	Plan Status			
3/28/2024 9:00 AM - 4:00	PM Food Pantry	April	0	58	Ready	View	Load A Plan to Device	

9. Click Yes to download data. Now you're ready for your distribution!

10. BEFORE GOING OFFLINE, select the Offline Mode toggle switch in the menu.

	×			Online			
Home	î	t only. Please do not use this e	nvironment for live intake or activity.				
Reservations						+ Add N <u>ew I</u>	lousehold & Vis
Offline Mode							
Plans		Search					Q
Upload Data							
Reconcile Data					Visit Date		
Offline Mode					3/28/2024	Ē	
Duplicate Management		Today's Activ	vities				
Reports		Total Households Served (duplicated)	New Households Served (unduplicated)	Total Individuals Served (duplicated	New India Served (u	viduals induplicated)	
Quality Control Repo	rt	3	2	7	4		
TEFAP Compliance Report	L	households	households	individuals	individua	ls	

- 11. You can now turn off WiFi or move away from your service area, and do neighbor intake as usual!
 - a. The orange screen indicates that you are in Offline Mode.
 - b. The intake numbers will be specific to your device only; they will not be able to track input on other devices while offline.

Int	ake						+ Add New	Household & Visit
	Name	~	Search					Q
						Visit Date		
						3/28/2024	Ē	
		То	day's Activi	ties				
		Tot Ser	al Households ved (duplicated)	New Households Served (unduplicated)	Total Individuals Served (duplicated	s Ne d) Se	w Individuals rved (unduplicated)	
		0) 	O	O	C) Historia	
			ISENDIUS	nousenoids		""		
		Ag	e groups served		# of Individuals (o			
		Ad	ults		0			
		Sei	niors					

- 12. After the distribution and neighbor intake is over, reconnect each device to WiFi or service and **turn off** the Offline Mode switch in the menu.
- 13. For each device, select **Upload Data** from the menu and click **Upload**. Your data will upload to the online site.
- 14. Finally, select **Reconcile Data** and click **Reconcile**. Check each of the three tabs to verify the information, and then click **Save**.
- 15. Offline Mode Complete!