



AGENCY TOOLKIT

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HELP US BETTER SERVE YOU

We are using a check-in system that allows us to better understand your needs, improve our services, and advocate for more support – **so we can offer YOU better services!**

You will be asked to share:

Basic Information about yourself & your household – such as age, ethnicity, gender, & dietary needs.

Many questions are optional, but answering them will help us better meet your needs!

This will help with:

Easier & faster check in. You will only register once, future check-ins are quick!

Understanding your needs & providing more personalized services.

Advocating for increased funding and resources to improve our services.

Who can see this:

Only trained staff who have agreed to keeping information confidential will have access.

Any **information that is shared outside of our network is anonymous**, meaning it cannot be traced back to you.

Your information is safe:

Our system has the same level of protection as your bank. This is safer than storing your information on paper.

All users sign privacy agreements to keep your information confidential. **We will NEVER share your identifiable information with a government entity or public authority.**

PRIVACY: YOUR DATA, YOUR RIGHTS

We will always treat you and your information with dignity & respect.

You will never be refused service or discriminated against based on your answers, or whether or not you choose to participate.





Agency Onboarding Checklist

- ☐ Orientation
- ☐ Agency Toolkit
- ☐ Access to Training Environment & Training Library
- ☐ Equipment
- ☐ **Post/Handout Neighbor Flyers ASAP**

- ☐ Follow-up after orientation
 - Confirm GO LIVE date
 - Discuss best GO LIVE intake strategies
 - Configure Agency Setup in Live Environment (Distribution schedules, Users)
 - LIVE Day Confirmation Email (will include logins)

- ☐ First GO LIVE Distribution
 - We will be there to assist (with extra devices)
 - Login cards will be distributed
 - **Agreements signed (Data Sharing, User Confidentiality, & Equipment)**
 - Document any issues/follow-up/feedback

- ☐ Second GO LIVE Distribution
 - We will be there to assist (with extra devices)
 - Discuss progress & feedback
 - Assess needs for additional support

- ☐ Follow-up after GO LIVE
 - Quick How-to for Reports
 - Months 1 & 2 Pulse Check

- ☐ Optional Data Workshop over Zoom (about 6 months after GO LIVE)
 - Deep Dive into Reports
 - Share Data Uses/Success Stories
 - Your Program's & Community's Needs Discussion

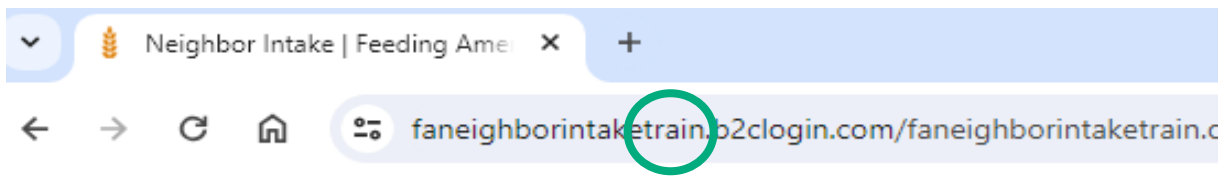
Common Issues

Trouble Logging In – “We can’t seem to find your account”

Cause: User is attempting to login to the training site, rather than the real live website.

Fix:

1. Check your web address, make sure the word “train” is not in it (see *screenshot below*). If you see “train” anywhere in the web address, you are in the training site.
2. Go to the correct website, **<https://network.neighborintake.org>**.

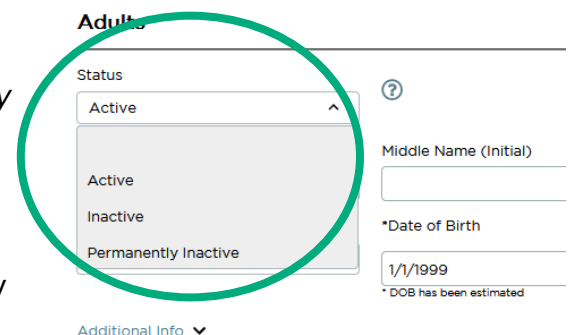


Neighbor duplicated in a Household

Cause: A household member was added twice in a profile.

Fix:

1. Continue through the intake process like normal.
2. After the visit is done, search for the neighbor, click the + sign and “View Household Info” *Note: This capability is only available for “Agency User” permission settings.*
3. Scroll to the Household member that is duplicated, change Status to “Permanently Inactive” (see *screenshot to the right*).
4. Scroll to the bottom and click Save.





Troubleshooting Quick Guide

Who to Contact

If you are experiencing issues or need help with Service Insights, please reach us in any of the following ways:

Email: si@regionalfoodbank.net

Phone: (518) 786-3691 x 777

If you are emailing us about a system error/bug, please try to include screenshots of what's happening.

We welcome and value your feedback! Feel free to contact us about any suggestions to improve Service Insights!

Backup Plan

If we are unable to resolve your issue immediately, please keep a log of neighbors' names and household age groups as a backup. (Example Below)

Name	Adults (18-59)	Children (0-17)	Seniors (59+)
Sarah Smith	2	1	-
Jerry King	-	-	1

New neighbors will need to complete a paper USDA Attestation/TEFAP form in the event you are unable to use Service Insights. Up to date copies of the form can be found at <https://regionalfoodbank.net/agency-resources/agency-resources-and-forms>.



Step by Step Intake Guide

STEP 1

- Open Google Chrome
- In the top bar, type network.neighborintake.org and press enter on your keyboard

STEP 2

- Type in Username and Password
- Click Sign In

STEP 3 (only applicable to users with a shared login)

- Type in First Name & Last Name
- Click Accept

STEP 4

- Type the first 3-4 letters of the neighbor's last name in the search bar
- Click the magnifying glass button OR Press Enter on your keyboard

STEP 5

If the returning neighbor appears in your search results:

- Click the + sign on the left of the neighbor's name
- Check for TEFAP Status and Notes
- Click Add Visit
- Check the primary service box that is applicable (choose USDA Attestation (TEFAP) only if recertification is needed), click Next
- Scroll through the Household Info page, update any neighbor information as needed
- At bottom of page, click Save & Continue
- Click Finish

If it is a new neighbor and there are no search results:

- Click Add New Household & Visit
- Check the primary service box under USDA Attestation (TEFAP), click Next
- On the Eligibility, fill out all required questions, click Save & Continue
- On the Signature page, check the box and click Verbal Signature, click Save & Continue
- On the Household Info page, fill out all required questions, click Save & Continue
- On the Finish Visit page, select any Additional Services if needed and click Finish

Tips for a Welcoming Intake Process

Always greet neighbors with a smile! Everyone should feel welcome and comfortable at your pantry.

When possible, ask intake questions in a quiet, private area. No one enjoys shouting their personal information across a room.

If someone does not understand the question you asked, try asking it in a different way. For example, instead of asking "How many people are in your household?" ask "How many people live with you?" or "Do you live alone?"

Provide context for a question if a neighbor is hesitant. Remember, you can click on the Question Mark icon next to each question for guidance. These responses are designed to provide the "why" about every question in the system.

Respect a neighbor's right to decline providing information. If a neighbor decides not to answer a question, do not pressure them. Simply move on to the next question.

Verbal Consent Guide

Please consider this brief statement to get the permission of neighbors before collecting their information:

"Welcome! This pantry has switched to an electronic system to do our intake process. I'll be asking you a few questions about you and your household. If there is a question you don't feel comfortable answering, just let me know and we can skip it. Have you had a chance to read the document explaining our new intake process? If not, please take a moment to review it."

Refer them to the Neighbor flyer provided by the Regional Food Bank.

"None of the information you share with us today will be viewed by anyone other than myself and anyone here assisting with our intake process. We're asking you these questions today to help our organization better serve you and our entire community. Are you ok moving forward with our new system?"

If the community member agrees, move forward with the intake process.

If the community member is hesitant, try the following statement:

"If I can try to reassure you, none of your personal information will be shared with anyone outside of this organization. Protecting your information and privacy is our priority. All your information is secure and uses the same protection as online banks. Having some basic information about you will help us better understand the people we serve so that we can better meet your needs. Would you like to proceed?"

If the community member agrees, move forward with the intake process.

If the community member says no, continue by doing an anonymous intake.

Suggested Intake Scripting

INTRODUCTION AND CONSENT

**"Hello, my name is [_], and I'm going to ask you a few questions to get you checked-in today."
Always check if a neighbor is already in the system by searching for them.**

If they are in the system, proceed through steps to complete their visit. If not found in system, review the verbal consent guide and then go through the following suggested steps:

BASIC INFORMATION

"What is your first and last name?" *If the neighbor does not wish to disclose their name:*

"Would you be willing to provide your first and last initials instead?"

CONTACT INFORMATION

"Can you tell me your address?" *If the neighbor does not have a permanent address or does not want to share their address,, click "No Fixed Address."*

"Could you give us your email and/or phone number?" *If the neighbor does not want to share their phone number, click "No Phone."*

HOUSEHOLD INFORMATION

"How many people are in your home, not including you?" *Enter the number in the corresponding box, make sure to only enter the number of additional people in the home. If the neighbor lives alone, leave this box as "0."*

"Can I have the names of the additional household members?"

See Next Page/Back

Suggested Intake Scripting

USDA ATTESTATION/TEFAP QUESTIONS

“Does anyone in your home receive SNAP or Food Stamps?” “Does anyone in your home receive other benefits like WIC, Medicaid, SSI or TANF?”

*If the neighbor receives any of the above benefits, you may click “Don’t know” for the income question. If the neighbor does not receive any of the above benefits, ask **“Is your annual household income under this amount?”** and show them the income figure on the screen.*

SIGNATURE

“We are going to mark you for a verbal signature today, this just means you’re agreeing the information you provided is true.”

AGE

“Can I have your date of birth or your age?”

If the neighbor does not want to give their age, you may ask them to enter it themselves in the system OR enter it yourself to your best judgement.

GENDER

“Would you like to provide your gender today?”

Read the list if necessary, mark “Don’t know / Prefer not to answer” if they do not wish to respond.

RACE / ETHNICITY

“Would you like to provide your race or ethnicity today?”

Read the list if necessary, mark “Don’t know / Prefer not to answer” if they do not wish to respond.



Service Insights

Suggested Intake Scripting

AGE FOR HOUSEHOLD

"Can you give me the date of birth or age for the other household members?" *Remember, Gender and Race/Ethnicity are both optional for the other household members, you may fill this information by clicking on "Additional Info."*

ADDITIONAL QUESTIONS

Language	(optional on 2 nd visit)
Military Service	(required on 2 nd visit)
Dietary Restrictions	(required on 2 nd visit)
Health Conditions	(if applicable, required on 2 nd visit)

PRIMARY SERVICE PROVIDED

You can ignore the boxes under this heading – programs that wish to record the number of pounds or meals provided per neighbor at a distribution can do so.

ADD ADDITIONAL SERVICE

If your program has additional services, you will see them under this heading (Services such as baby supplies, clothing, personal hygiene items, etc.) *Simply check the box if applicable and enter any details you wish in the boxes provided.*

INTAKE WRAP-UP

"Thank you for your patience! We are all done for today. If any of your information changes in the future, please let us know so we can update it in our system.

After completing the intake, be sure to inform the neighbor of the next step in their visit. For instance, "Please see Janet to my left, and she will help you shop today."



How to Search For a Neighbor

Service Insights stores neighbor profiles so that they can easily be checked in for a returning visit. A neighbor should be searched for before every visit. On the home page, you will find 5 different ways to search for a neighbor.

NAME

You can search by:

- Last name only (ex: Doe)
- First SPACE last name (ex: John Doe)
- Last COMMA first name (ex: Doe, John)

You can use a partial name search; it is recommended to use the first 3-4 letters of the last name when possible to keep the search broader and account for spelling errors.

ADDRESS

Search for a neighbor's street address (ex: 5 Main St.) However, you cannot search by only city, state or ZIP code.

PHONE NUMBER

You can search by:

- 123-123-4444
- 1231234444
- The last 4 digits (ex: 4444)

DATE OF BIRTH

You can search by:

- MM-DD-YYYY
- MM/DD/YYYY
- MM.DD.YYYY
- MMDDYYYY

ALT. ID

Use this for quick check-in if the neighbor has a digital or physical ID Card. When the Alt. ID search is selected, you can enter the Alt. ID into the search bar OR click the barcode icon to activate your device's camera and scan the QR code.

A screenshot of the "Intake" search interface. At the top, there's a dark blue header with the word "Intake" in white. Below it is a search bar with a dropdown menu currently showing "Alt. Id" with an upward arrow. To the right of the dropdown is a "Search" button with a magnifying glass icon. Below the search bar, there's a table with two columns. The first column lists search criteria: "Alt. Id", "Address", "Date of Birth", "Name", and "Phone #". The second column shows the "Visit Date" as "6/2/2024".



Service Insights

Greeting:

Welcome! We are using a new system today. We have some questions for you, let me know if you don't want to respond to any of the questions. ¡Bienvenido! Estamos usando un sistema nuevo hoy. Tenemos algunas preguntas para usted, déjame saber si no quieres responder cualquiera de las preguntas.

Search:

What is your last name? ¿Cuál es su apellido?

What is your phone number? ¿Cuál es su número de teléfono?

Eligibility – Page 1:

What is your first name? ¿Cuál es su nombre?

What is your address? ¿Cuál es su dirección?

Would you like to give us your email and/or your phone number? ¿Le gustaría darnos su correo electrónico y/o su número de teléfono?

Can we use this (number/email) to contact you? ¿Podemos usar esta manera para contactarle?

Other than yourself, how many people are in your home? ¿Aparte de usted, cuantas personas viven en su casa?

Can you tell me the names of the other people? ¿Puedes decirme los nombres de las otras personas en su casa?

Do you receive any government benefits like SNAP/Food Stamps, WIC, Medicaid, SSI...? ¿Reciben beneficios del gobierno como SNAP/Food Stamps, WIC, Medicaid, SSI...?

Spanish Intake

Cheat Sheet

Signature – Page 2:

I am going to sign here to note that all the information you gave me is correct. Voy a firmar aquí para notar que toda la información que me dio esta correcta.

Household Info – Page 3:

How old are you? OR What is your date of birth? ¿Cuántos años tienes usted? O ¿Cuándo es su fecha de nacimiento?

Would you like to provide your gender or your race? ¿Le gustaría proporcionar su género y su raza?

For the other people in the home, can you tell me their ages? ¿Para las otras personas en su casa, puedes decirme sus edades o las fechas de nacimiento para ellos?

Has anyone in your home ever served in the US Military? ¿Alguien en su casa ha servido en el ejército de los Estados Unidos?

Does anyone in your home have dietary restrictions like low sodium/low sugar, food allergies...? ¿Alguien en su casa que tiene restricciones en sus dietas cómo baja en sodio o azúcar, alergias de comida...?

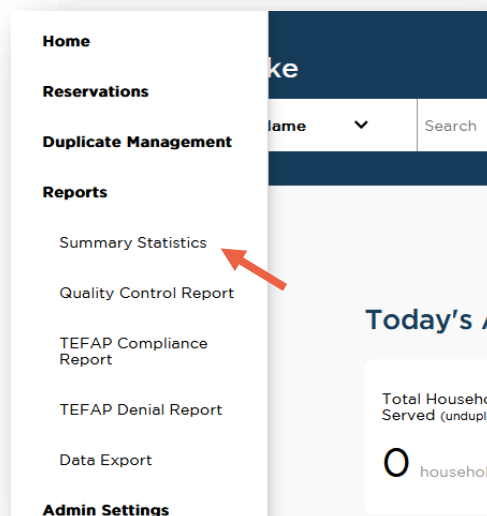
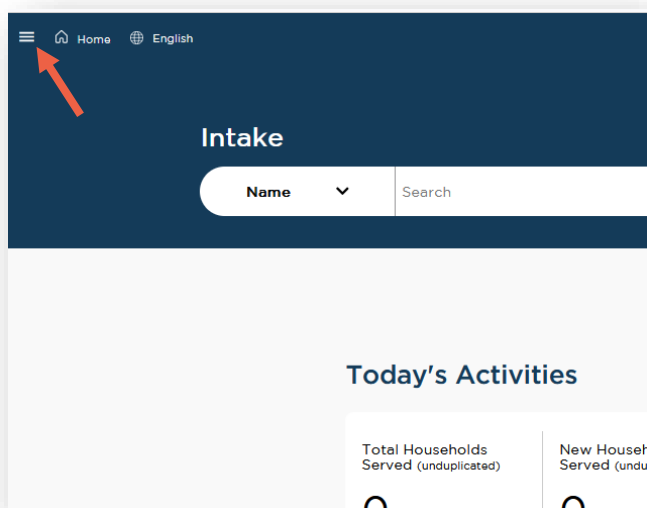
Does anyone in your home have health conditions such as diabetes, high blood pressure or hypertension? ¿Alguien en su casa que tiene condiciones de salud como diabetes, presión arterial alta o hipertensión?

Finish Visit – Page 4:

We are finished, thank you for your patience. You can go to get your food! Ya terminados con el registro, gracias por tu paciencia. ¡Sigue a recibir la comida!

Summary Statistics Reports Guide

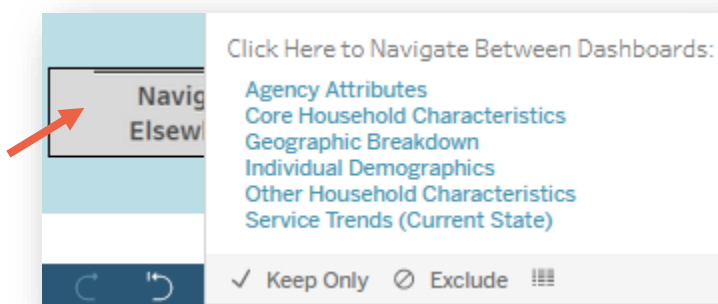
STEP 1: Log in to your Service Insights account. From the home page, click the upper left hamburger menu and go to "Summary Statistics".



STEP 2: Click the name of the report you'd like to access. There are seven reports to choose from.

STEP 3: The report will open in a new tab – Use the filters to focus on a specific date range, organization, event, program, service, or geography.

STEP 4: To open a different report, use the "Navigate Elsewhere" button and click on another report link. A new tab will open with the new report.





Summary Statistics Reports Guide

KEY TERMS:

- **Unduplicated:** The total number of unique individuals/households served.
- **Duplicated:** The total number of times an individual/household was served at an event during the date range. An individual/household is counted every time they attend an event.

REPORTS AVAILABLE:

Snapshot Overview: The Snapshot Overview report provides a quick view of your organization's visit history during a selected period. The info in this report can also be found in other Summary Statistics reports but are brought together here for easy access.

Individual Demographics: This report provides details about individuals served by your organization, broken out by age, gender identity, and race and ethnicity.

Core Household Characteristics: The Core Household Characteristics report provides information on different characteristics of the households served. Explore household size, age groups, visit frequency, SNAP participation, and more.

Other Household Characteristics: This report provides additional details about households served by your organization: the Regional Food Bank only asks a few of these data points during intake. The remaining factors available by Feeding America will show 100% "Not Reported".

Service Trends: This report provides details about individuals and households served by month, week, day, and day of the week. This report can be filtered by Households or Individuals, Duplicated or Unduplicated, Week or Day which offers 8 different views in the same report. To help you at a glance, the graphs are slightly different. Individuals are Orange. Households are Black. Duplicated is bold (dark) and unduplicated is opaque (lighter).

Geographic Breakdown (Heat Map): This report provides details about the number of people and household served by your organization, broken down by ZIP Codes and counties of those individuals and households.

Agency Attributes: This report provides administrative and service details about your organization. Organizations can have multiple program locations, all of which will appear in this report. The age range, visit start and end date filters only apply to the bottom charts: Service Details by Program Location and Service Details by Service Types.