Neighbor Intake User Manual

Last Updated August 2024

Neighbor Intake Platform
DRAFT User Manual

Last Updated August 2024

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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 neighbor intake 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.

Neighbor Intake Tool

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 app 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.

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.

Contact & Technical support

If you have technical issues or need support, please contact your WBFB Service Insights staff at Kbarthold@ceopeoplehelpingpeople.org

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 a distribution at a specific program location.

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.

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. Only primary services are reported on in Reports.
>
> 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. Secondary services are not reported on in Reports.

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

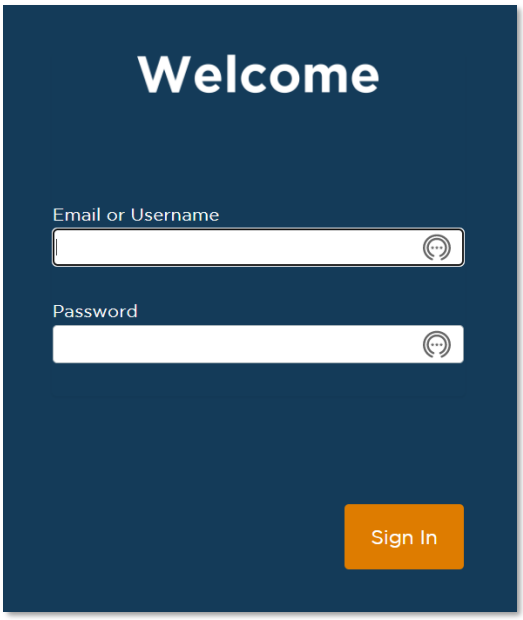
Visit: A visit is recorded any time a household is served at an event. Multiple primary and secondary services can be provided to a household during a visit. All members of the household are recorded as benefitting from that visit.

Getting Started

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

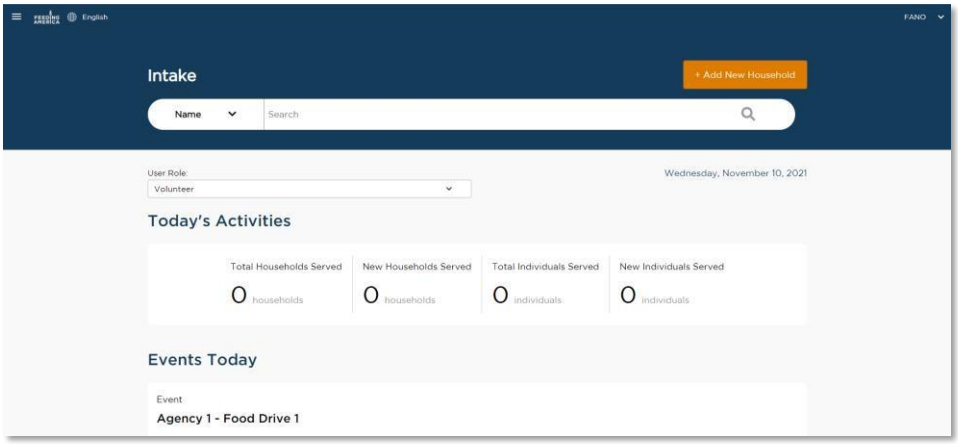
Logging In

To log in, go to neighborintake.org. Enter your Email address or Username and Password assigned by your administrator. Click Sign In.



Home Screen

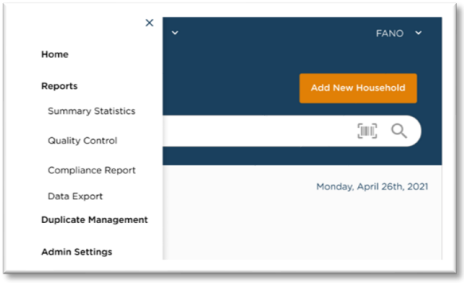
Once you log in, you will be taken to a home screen with a snapshot of recent activity. This is also where you will begin intake during an event.



For an agency user, 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)
- 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.

Using the Training Site

The training site can be accessed at https://training.neighborintake.org. Use the account that corresponds most closely to your actual role.

Non-TEFAP Agency – for partners who do not distribute TEFAP food
Agency intake user
Username: PracticeNonTefap
Password: Test1234

Commented [SP1]: UPDATE for TEFAP login

Use the training site to learn and explore the system prior to go-live, along with training with new agencies and users. You should never use the real site for training purposes because you could accidentally enter fake data in the live platform, and you run the risk of exposing neighbors' personal information unnecessarily.

The training site is configured to represent a fictional food bank, agency, users, and neighbors. For TEFAP, the training site is configured to represent regional TEFAP rules. Thus, the training site will not be configured exactly like your food bank or agencies, nor does it contain all the functionality of the live platform.

Please create families with local ZIP codes so that they will appear in our search results correctly.

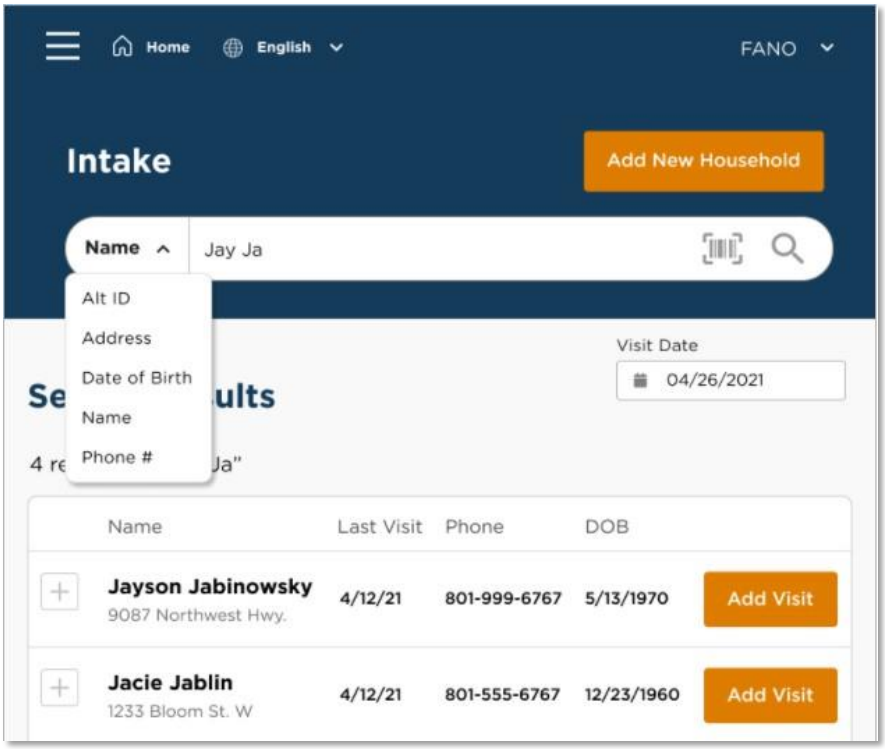
Note: https://training.neighborintake.org is a temporary domain name pending the final name of the platform.

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

Always use the Search function 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 codes used in our region (NY, PA).



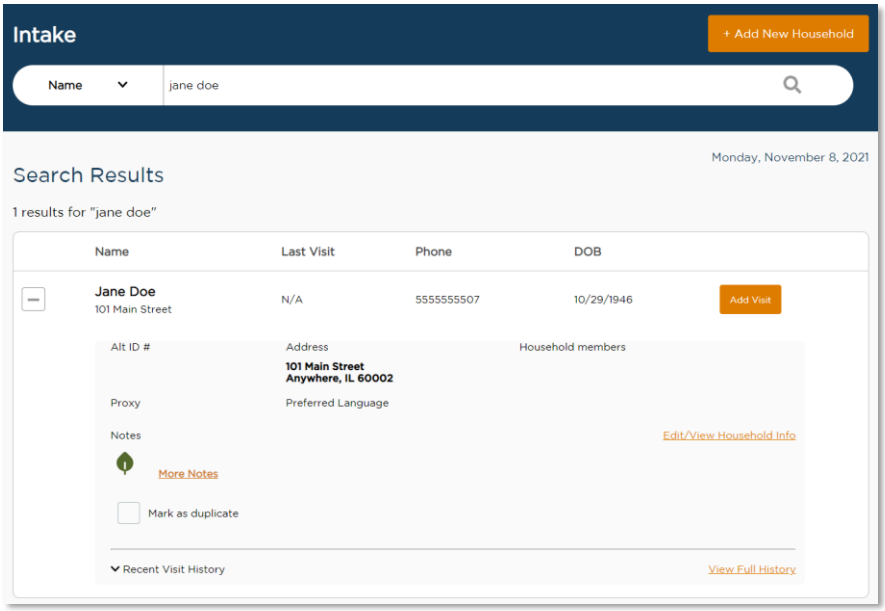
1. From the home screen, begin by searching the system for a neighbor's profile. The search bar is located at the top of the screen. You can search the system for a neighbor's profile by:

- Alt. ID: use this for quick check-in if the returning neighbor has a barcode card or Alt. ID number.
    - Use your USB barcode scanner to scan the client's keycard.
    - If you can't use your barcode scanner, you can use your device's camera. When Alt. ID is 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. 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
    - Edit/View Household Info

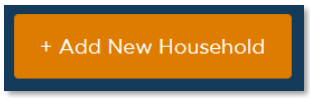
- Household Visit History
- Mark as duplicate



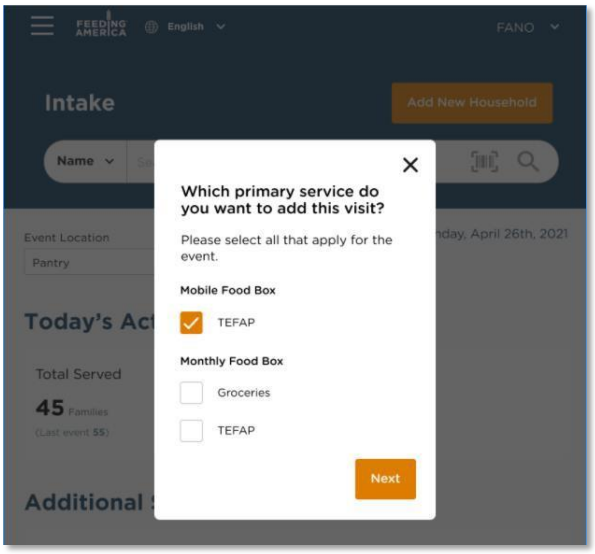
Add a New Household

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

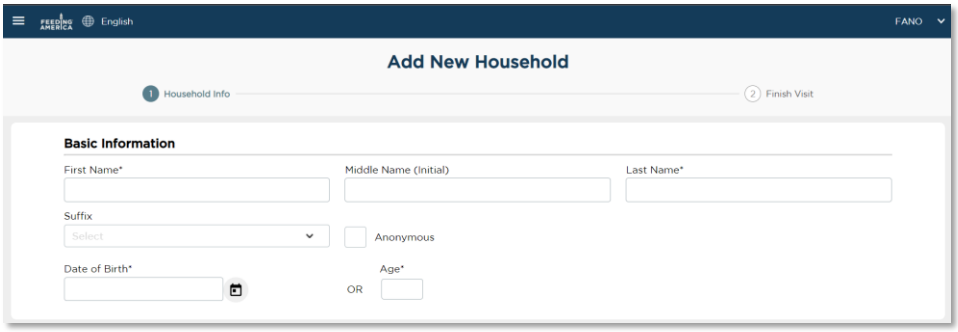
1. From the home screen, click the Add New Household button on the top right of the home screen. To avoid creating a duplicate profile, first search for the household to confirm that they haven't already been added to the system by your agency or another in your network.



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

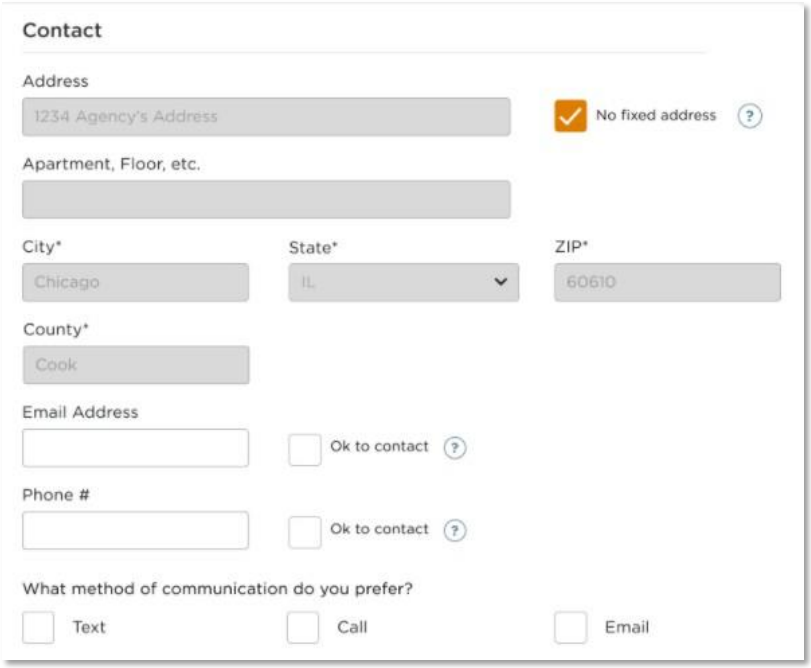


4. On the Household Info screen, you will ask the neighbor for their basic information and any additional questions used by your food bank and/or agency. The full list of questions is below (* = required), but the list you see under Household Info will be pre-determined by your food bank, agency, and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

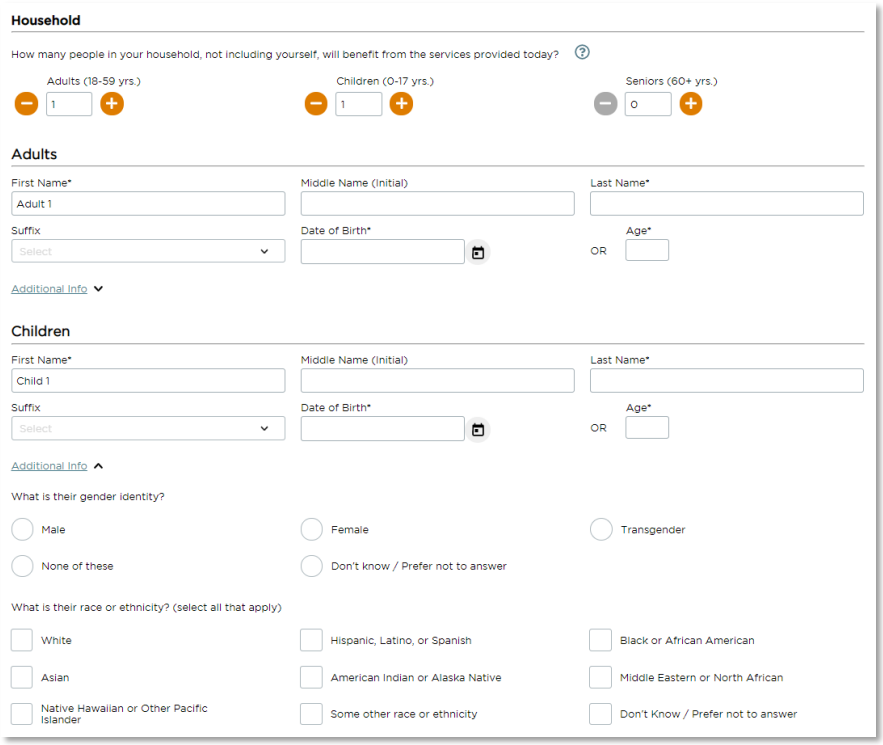
    - Basic information

- 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

- Gender Identity*: select one
- Race or Ethnicity*: select all that apply. Drop-down menus appear if the neighbor chooses to provide additional information.
- 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. Phone number is an important method of contact for food recall information.
        - If the neighbor selects Ok to contact for phone number, Neighbor Intake will text them an Alt. ID (barcode) that can be scanned if they forget their keycard.
- Preferred Language(s): Selecting "Needs translation services" may be helpful to your agency to better communicate with the neighbor at future visits.
- Household Member Count*: use the orange + and - buttons to indicate the number of *additional* adults, children, and seniors 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 should write over these.
        - Some neighbors may feel uncomfortable sharing their household members' information, especially children. Reassure them that this information is protected and only used to improve our services to the community. However, if you cannot persuade a neighbor to share their household members' names, you may leave the default first name of "Child 1," "Senior 1," etc.
    - Date of Birth or Age*
    - Gender Identity
    - Race or Ethnicity



Household

How many people in your household, not including yourself, will benefit from the services provided today?

Adults (18-59 yrs.) 1 | Children (0-17 yrs.) 1 | Seniors (60+ yrs.) 0

Adults

First Name* Adult 1 | Middle Name (Initial) | Last Name*

Suffix Select | Date of Birth* | OR Age*

Additional Info

Children

First Name* Child 1 | Middle Name (Initial) | Last Name*

Suffix Select | Date of Birth* | OR Age*

Additional Info

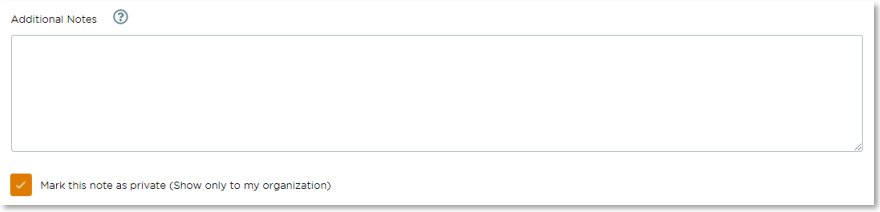
What is their gender identity?

Male | Female | Transgender | None of these | Don't know / Prefer not to answer

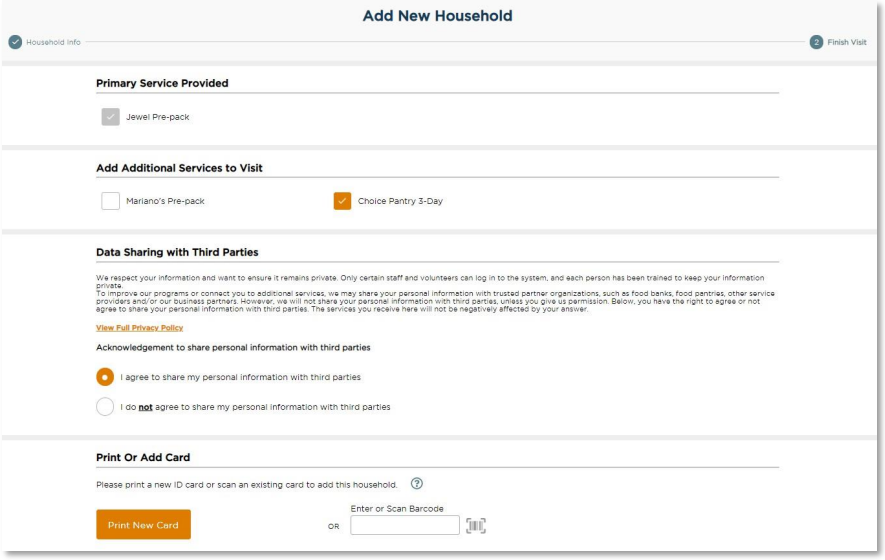
What is their race or ethnicity? (select all that apply)

White | Hispanic, Latino, or Spanish | Black or African American | Asian | American Indian or Alaska Native | Middle Eastern or North African | Native Hawaiian or Other Pacific Islander | Some other race or ethnicity | Don't Know / Prefer not to answer

- 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.
    - At future visits, the Proxy should present the name or keycard of the main client, not their own. We cannot search for Proxies in the database.
- Household Receipt of SNAP*
- Other Government Programs
- Household Monthly Income
- Household Military Status
- Household Dietary Factors or Concerns
- 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.

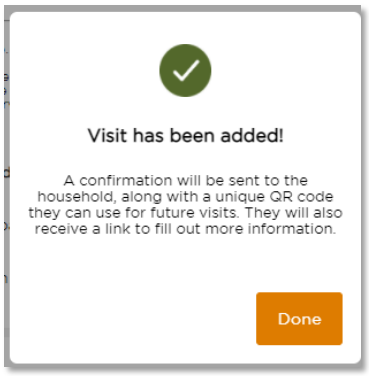


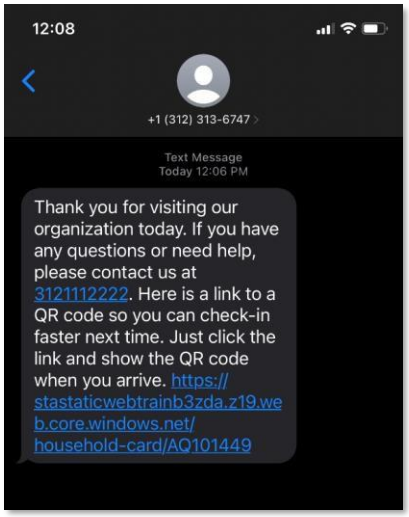
- Primary Services Provided: this is confirming the primary service you selected at the beginning of intake; you cannot change this selection.
- Add Additional Services to Visit: select any additional services provided to the neighbor; this list is pre-set for each event.
- Print or Add Card: A new barcode can be used to make return visits a simple one-step process.
    a. Choose Enter or Scan Barcode to link a WBFB keycard to the household's account. 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.

b. Choose Print New Card to create a new card in the system that you can print and give to the neighbor. Each card prints on a new sheet of paper.

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 only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).





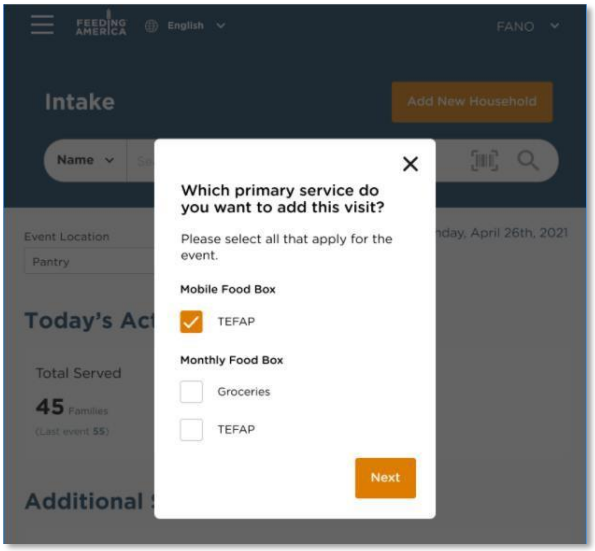
At any point during intake, you can go back to a previous screen by clicking the Back button on the top left of the screen. You can also cancel a visit by clicking Cancel on the bottom right of the screen; all information entered will be lost.

Add a New Household (TEFAP)

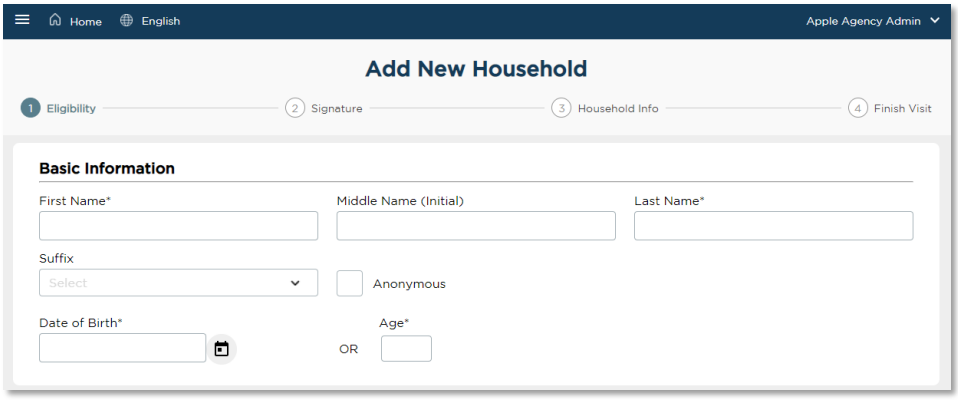
Add New Household is the process you complete to record a visit for a new household during an event.

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.

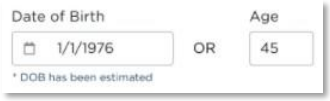
2. Choose the primary service(s) the neighbor is receiving. For a TEFAP visit, the primary service must be a TEFAP service so that the TEFAP intake form is activated. If your program location only has one primary service at an event, you will still need to select that service. Click Next to begin adding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



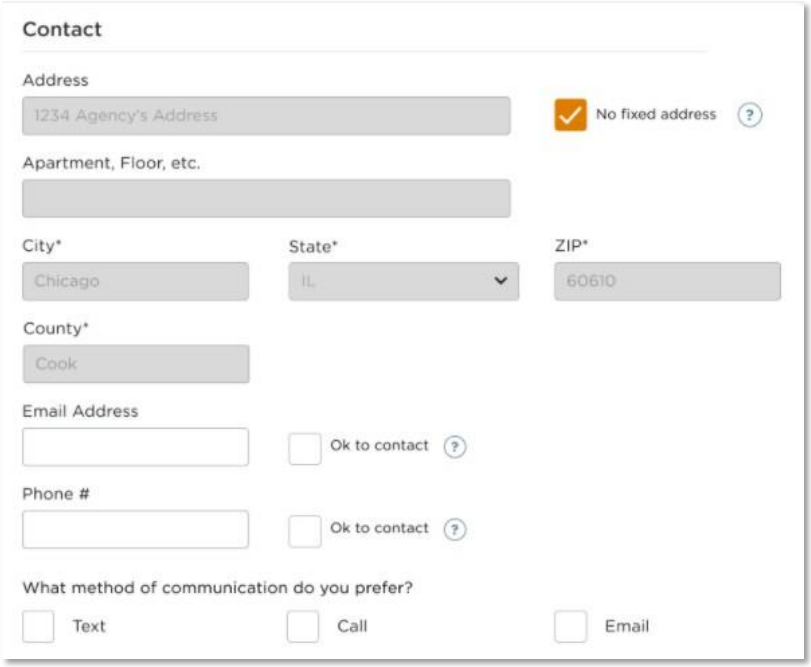
3. For TEFAP, there are 4 steps to adding a new household:
    1. Eligibility
    2. Signature
    3. Household Info
    4. Finish Visit



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.
   - 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. Phone number is an important method of contact for food recall information.



- Household Member Count*: use the orange + and - buttons to indicate the number of *additional* adults, children, and seniors 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 should write over these.
        - Some neighbors may feel uncomfortable sharing their household members' information, especially children. Reassure them that this information is protected and only used to improve our services to the community. However, if you cannot persuade a neighbor to share their household members' names, you may leave the default first name of "Child 1," "Senior 1," etc.
    - 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

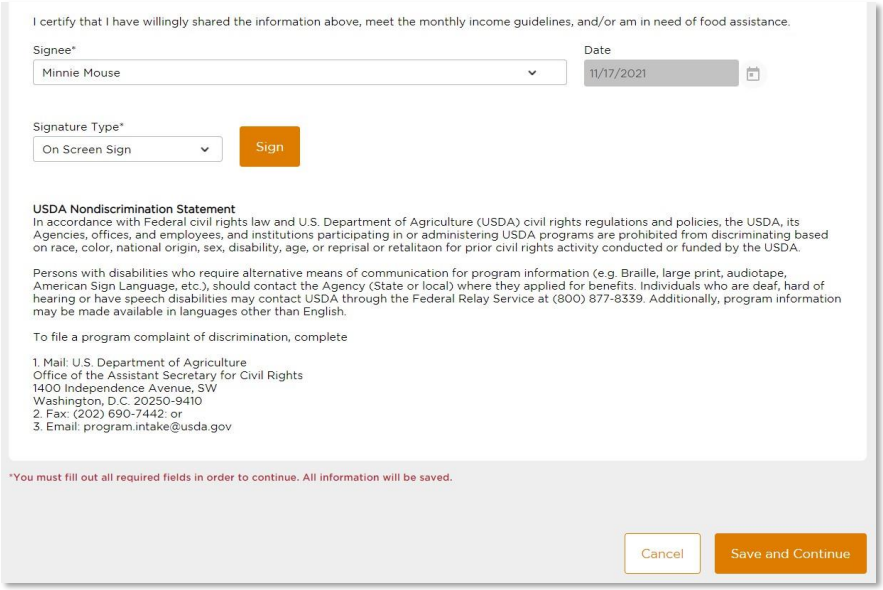
- Proxy: Select "yes" if there someone outside of the neighbor's household is authorized to pick up TEFAP for them. Types of proxies include general proxy, case manager, authorized representative, and other.
- Household Receipt of SNAP*
- Other Government Programs: This list will, at a minimum, align 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.
- "Not eligible? Continue to unregulated intake (if available)": Click this link if the neighbor does not qualify for TEFAP. You will be redirected to an unregulated intake flow (where

Commented [SP3]: Add tefap eligibility yes/no question

any information the neighbor has provided will be pre-populated) or back to the home screen if an unregulated service is not available at your event.

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.

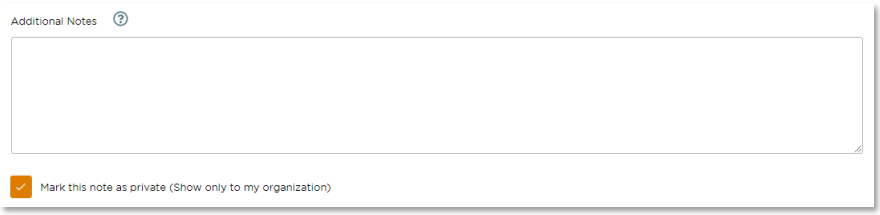
6. You will be taken to the Signature screen.
    - You will first see a recap of the neighbor's eligibility information: name, contact, address, household size, and income limit. Please confirm that this is correct.
    - Signee*: Select the person who is there in-person to pick up the TEFAP food. The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



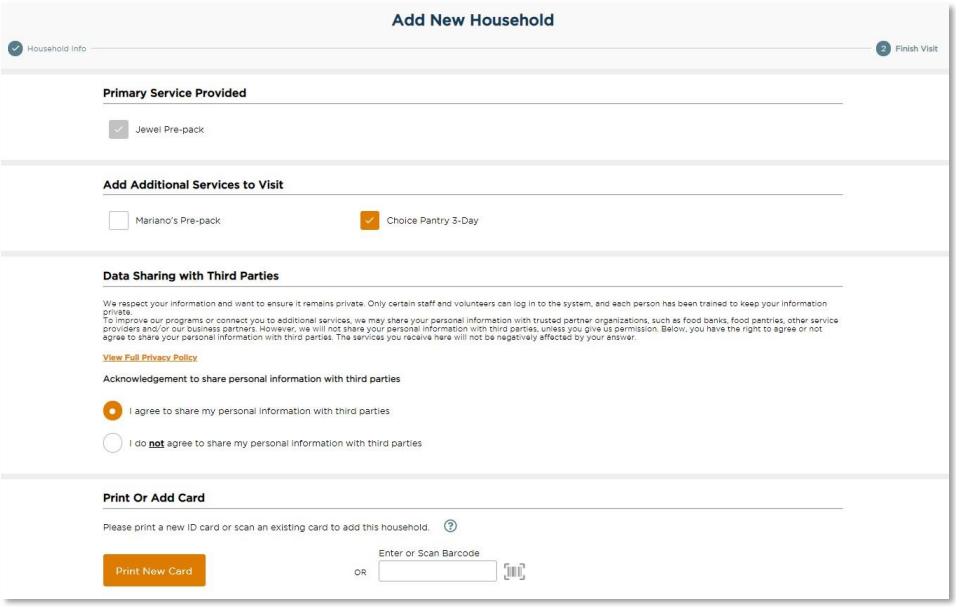
7. Once you collect the neighbor's signature, click Save and Continue. If you choose to Cancel, all information entered will be lost.
8. You will be taken to the Household Info screen, where you can ask any additional questions used by your food bank and/or agency that are not required for TEFAP. The full list of

questions is below (* = required), 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.

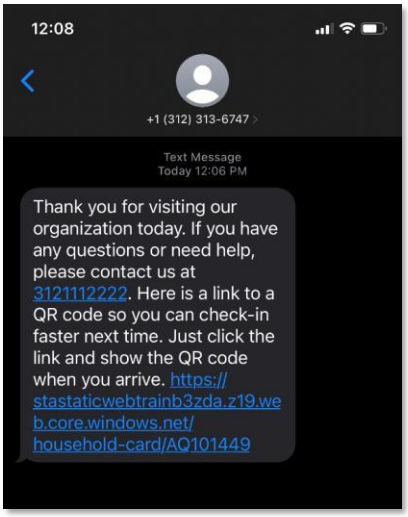


- Primary Services Provided: this is confirming the TEFAP primary service you selected at the beginning of intake; you cannot change this selection.
- Add Additional Services to Visit: select any additional services provided to the neighbor; this list is pre-set for each event.
- Print or Add Card: A new barcode can be used to make return visits a simple one-step process.
    a. Choose Enter or Scan Barcode to link a WBFB keycard to the household's account. 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.
    b. Choose Print New Card to create a new card in the system that you can print and give to the neighbor. Each card prints on a new sheet of paper.

  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

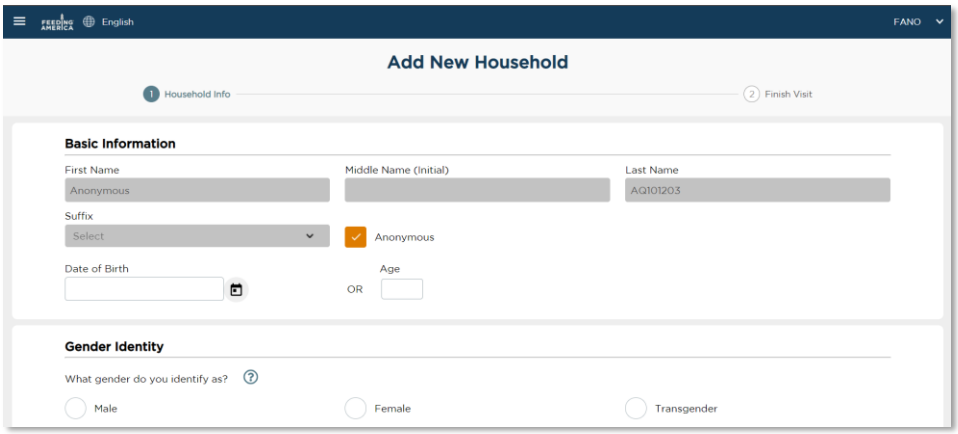
contact number in the follow-up text/email. A text/email will only be sent after the neighbor's first visit to an agency (i.e., the first time they are entered into the system).



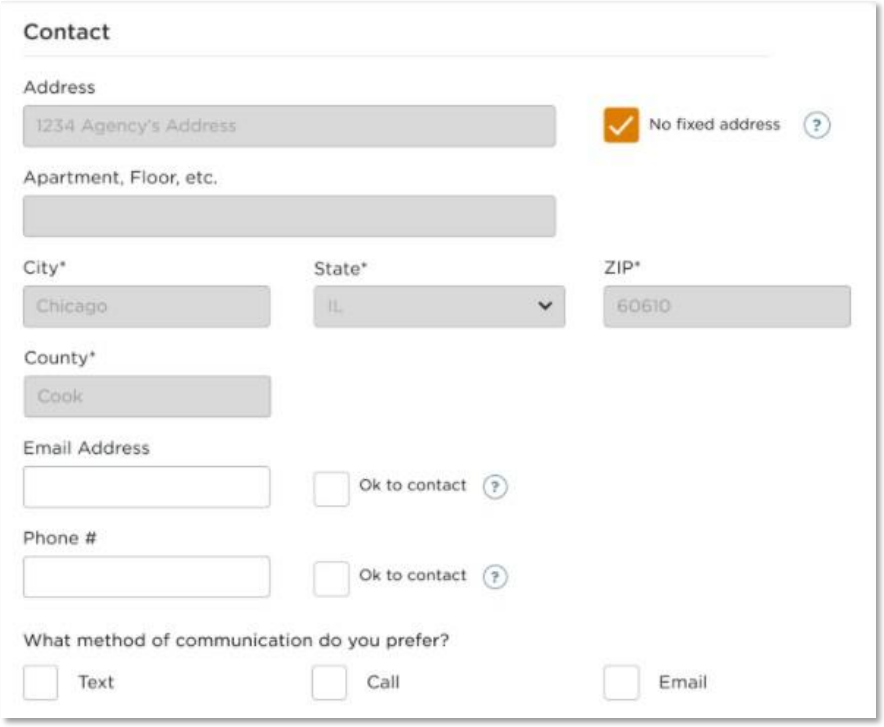
At any point during intake, you can go back to a previous screen by clicking the Back button on the top left of the screen. You can also cancel a visit by clicking Cancel on the bottom right of the screen; all information entered will be lost.

Add Anonymous Visit

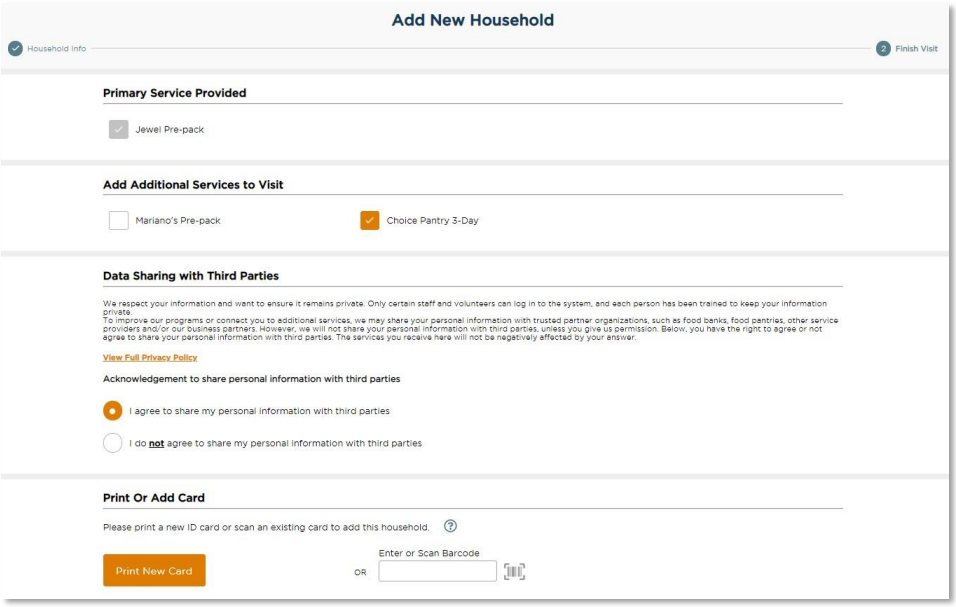
The anonymous visit option allows you to create a unique visit or household record for a neighbor who does not wish to share some or any of their personal information. It is a flexible option that removes the requirement to answer any question, thus giving the neighbor the choice to share. Note: the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



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. Using a keycard will also allow you to find their anonymous profile at a return visit.
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 is confirming 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 Enter or Scan Barcode to link a WBFB keycard to the household's account. 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.
    b. Choose Print New Card to create a new card in the system that you can print and give to the neighbor. Each card prints on a new sheet of paper.

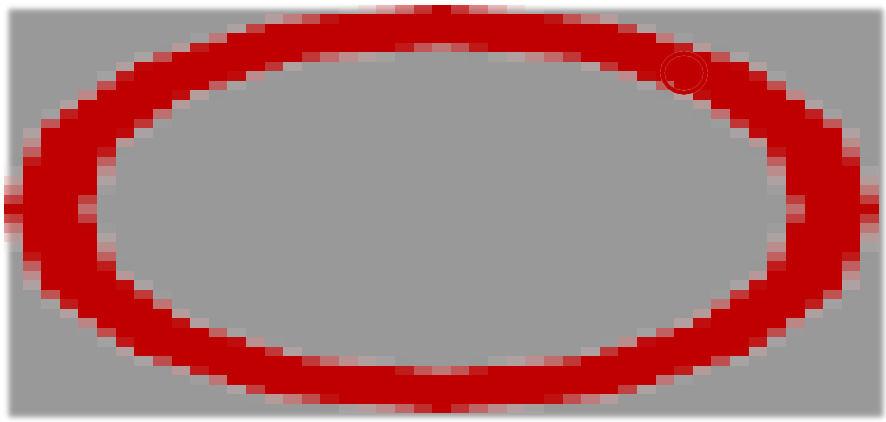
  You can have multiple new and existing barcodes associated with a household's account. A barcode card can be used at any agency using the system.

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:

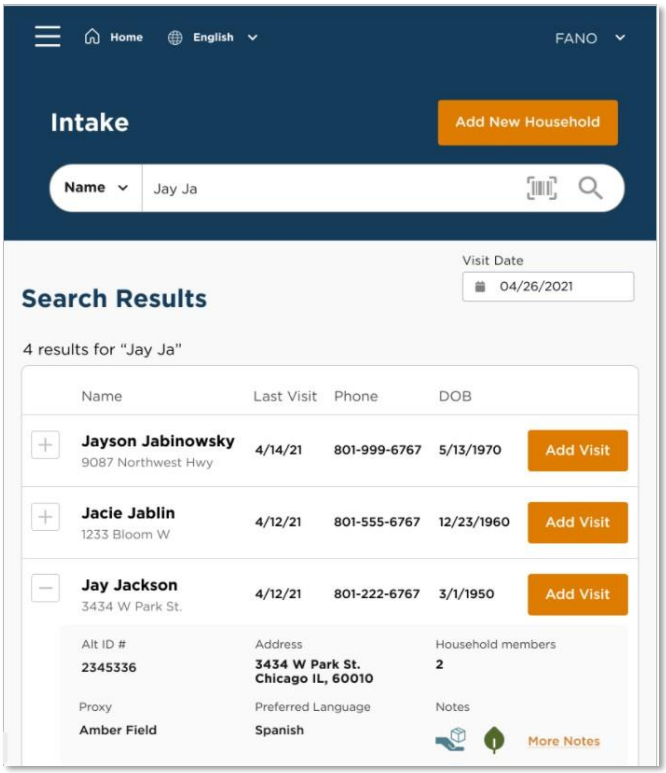
   - Alt. ID: use this for quick check-in if the returning neighbor has a barcode card or Alt. ID number.
     - Use your USB barcode scanner to scan the client's keycard.
     - If you can't use your barcode scanner, you can use your device's camera. When Alt. ID is selected, the barcode icon will appear on the right-hand side of the search bar. Click on the barcode icon to activate your device's camera. 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.

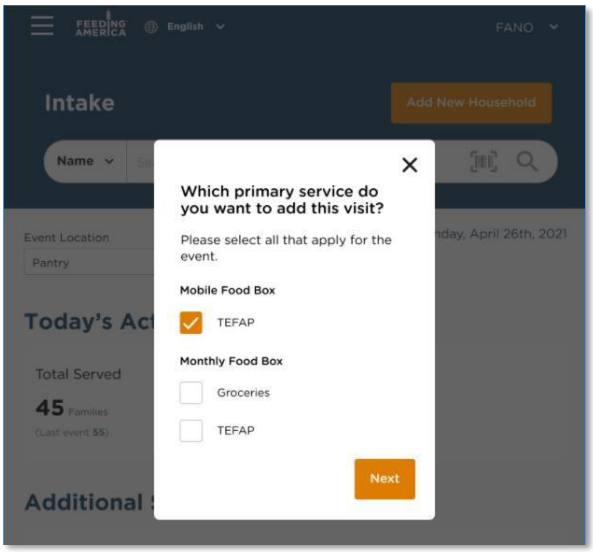
- Date of Birth: your search must be in the format MM-DD-YYYY, MM/DD/YYYY, MM.DD.YYYY or MMDDYYYY.
- Name: you can search by last name (e.g., Doe) or first and last name (e.g., *John Doe*).
- Phone #: your search must be in the format 123-123-4444, 1231234444, or the last 4 digits (e.g., *4444*).

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.

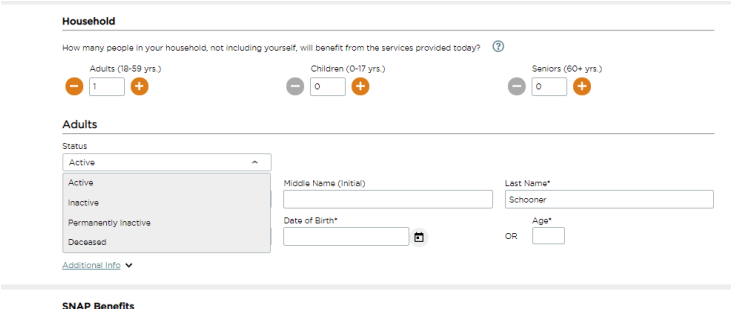


3. Click Add Visit next to the household's name to start a return visit.

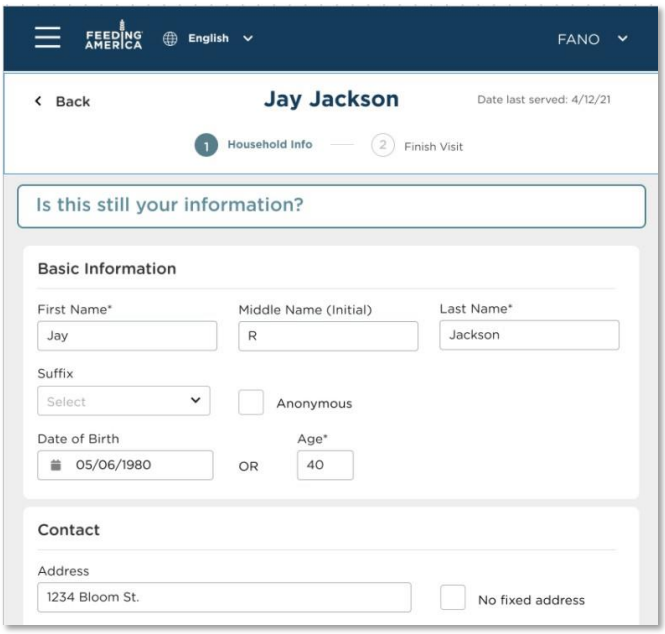
4. Choose the primary service(s) the neighbor is receiving. This will inform the intake form you complete with the neighbor. If your agency only has one primary service at an event, you will still need to select that service. Click Next to see the neighbor's household profile.



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.
    - 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 Enter or Scan Barcode to give the neighbor a new WBFB keycard. 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.

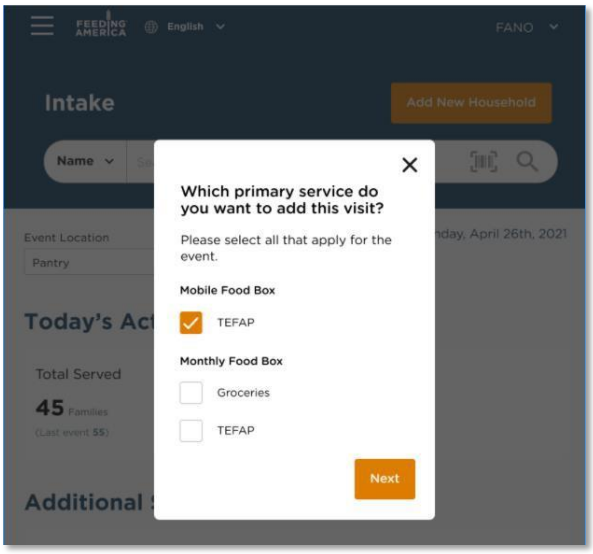
    A barcode card can be used at any agency using the system.
11. Click Finish to complete the visit and save all information. A pop-up will appear confirming that the visit has been added.

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.

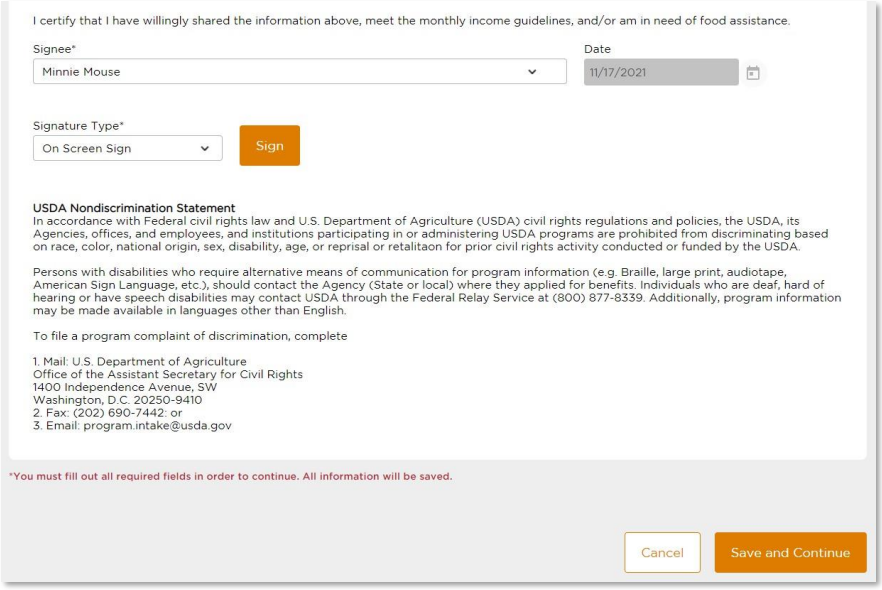
1. To begin, follow steps 1-3 in the Add a Return Visit section.
2. Choose the primary service(s) the neighbor is receiving. For a TEFAP visit, the primary service must be a TEFAP service so that the TEFAP intake form is activated. If your program location only has one primary service at an event, you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



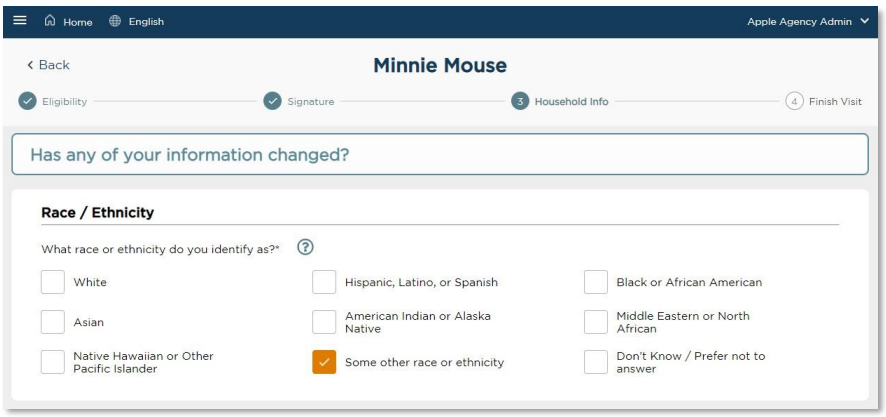
3. On the top of the Eligibility screen, you will see "Has any of your information changed?".
4. Review the neighbor's information with them. If any of the neighbor's information has changed, it may impact their eligibility for TEFAP, so it is important to review everything. Edit the neighbor's profile 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 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. If your state agency is currently requiring signatures, use the Sign on Screen option from the drop down menu.
        i. Sign on Screen: If you are using a tablet or smartphone, the client can use their finger or a stylus to sign. If you are using a laptop, the client should use the mouse or trackpad.

Commented [SP4]: We can edit signature options? Need to get rid of initials, etc?



7. Once you collect the neighbor's signature, click Save and Continue. If you choose to Cancel, all information entered will be lost.
12. 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.



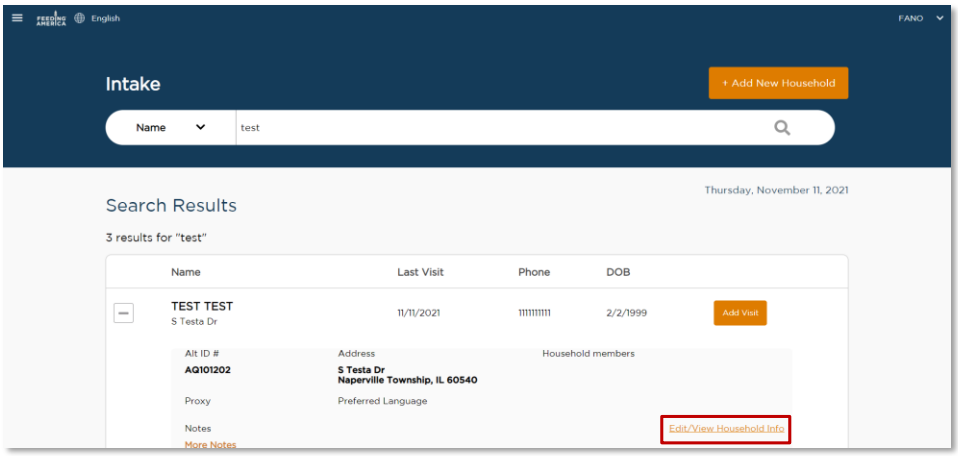
13. If the neighbor's profile information was previously gathered using a different intake form or at a different agency, there may be some blank questions on your intake form. Ask these questions to the neighbor now.
14. You can add a new Note to the neighbor's profile to document their experience, 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.
15. Click Save and Continue to move on to the Finish Visit screen. If you choose to Cancel, all information entered will be lost.
16. 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 Enter or Scan Barcode to give the neighbor a new WBFB keycard. 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.
17. Click Finish to complete the visit and save all information. A pop-up will appear confirming that the visit has been added.

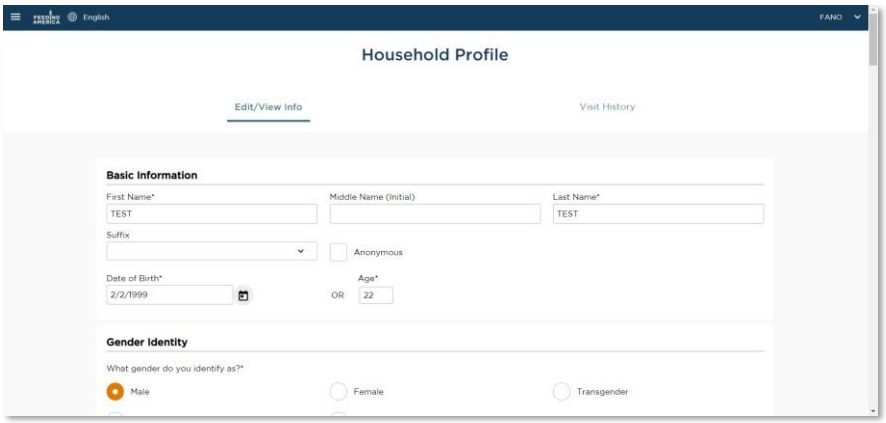
At any point during intake, you can go back to a previous screen by clicking the Back button on the top left of the screen. You can also cancel a visit by clicking Cancel on the bottom right of the screen; all information entered will be lost.

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.

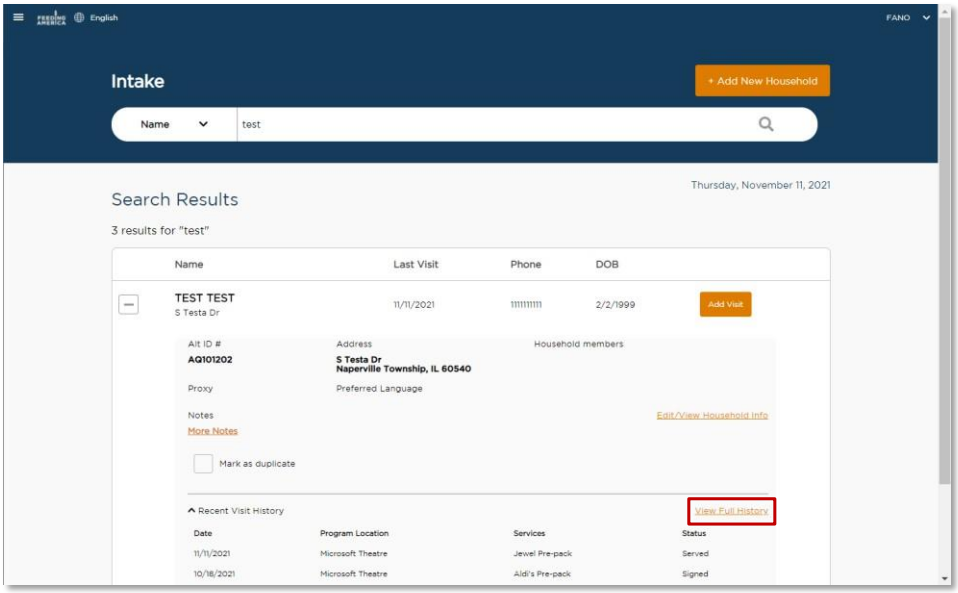


4. The neighbor's full household profile will be available for you to edit or view. Note that this is the neighbor's most recent profile information; to view profile information from a specific past visit, you will need to do so through Household Visit History.
5. If you make any changes, you must click Save at the bottom of the screen. You can also Cancel at the bottom of the screen; any changes you make will be lost.

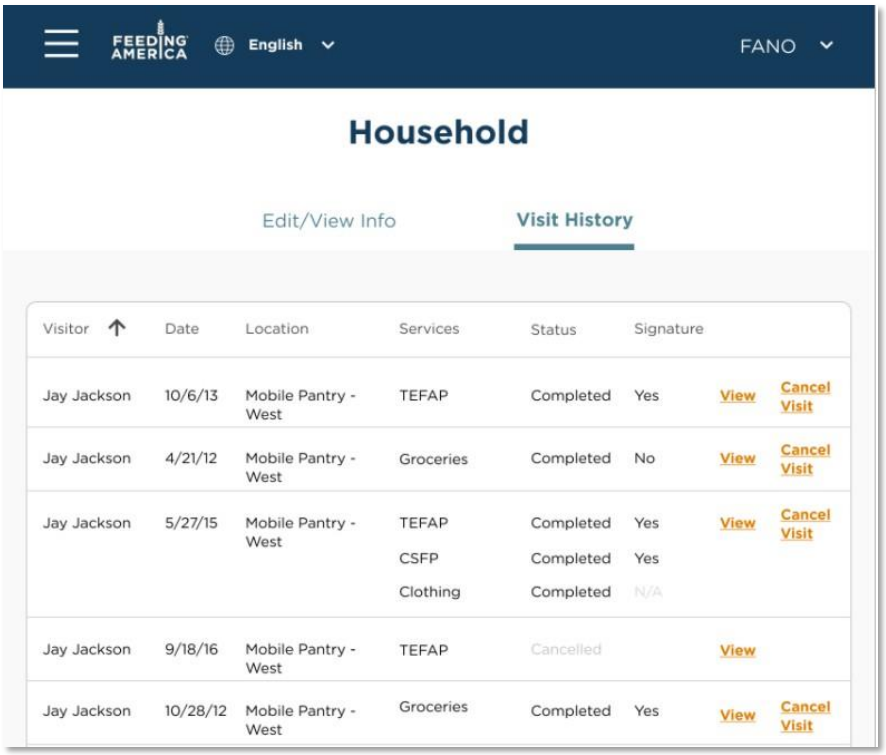
Household Visit History

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 (see Agencies section). Thus, you may only see a neighbor's partial visit history, depending on other agencies' privacy settings.

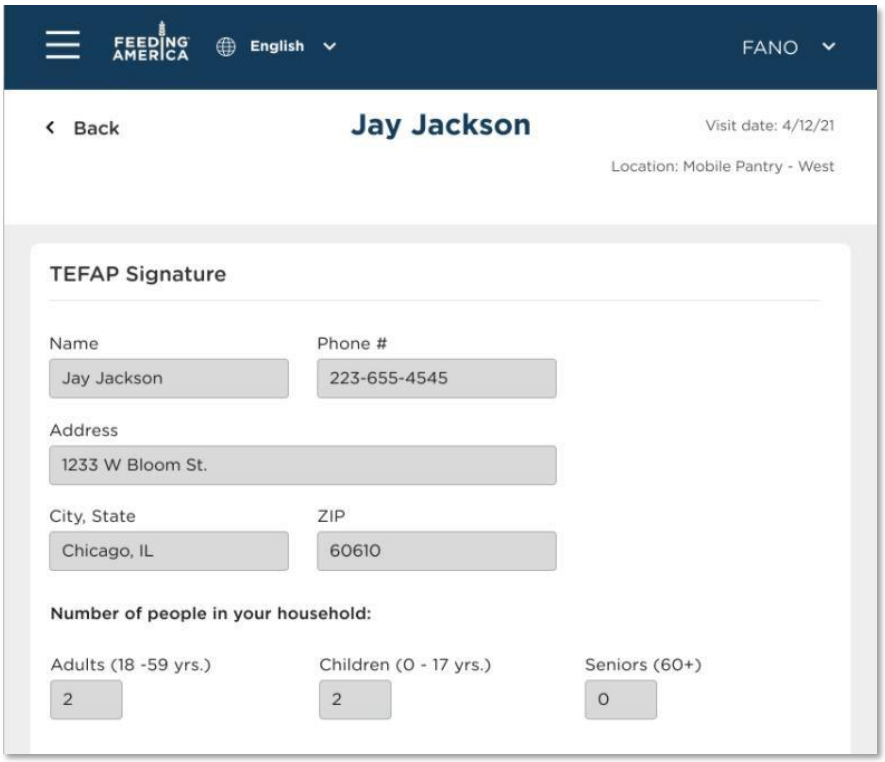


1. From the home screen, search the system for a neighbor's household profile. The search bar is located at the top of the screen. You can search the system for a neighbor's profile by:
    - Alt. ID
    - Address
    - Date of Birth
    - Name
    - Phone #
2. Once you identify the correct household record, expand the record using the + and - icon to the left of the name.
3. Click View Full History.

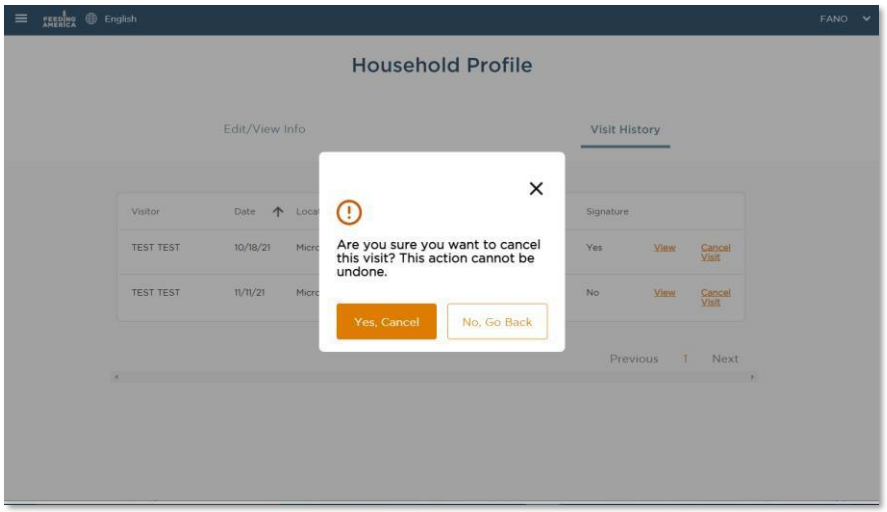


4. The neighbor's visit history will appear, displaying the following information. Each column is sortable in alphabetical or reverse alphabetical order; click on the column title to sort by that column.
    - Only the neighbor's visits at your site will appear. You cannot see their visits to other WBFB Partner locations.
    - 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.*

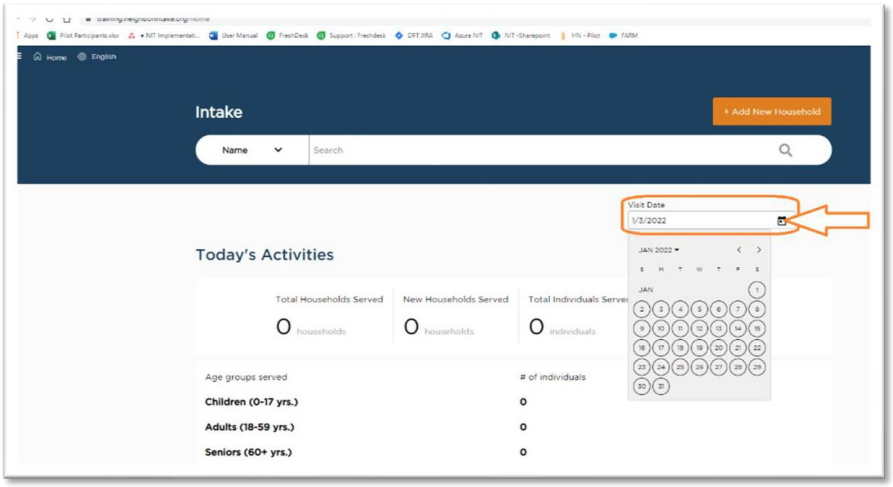


7. When you are finished viewing a household's visit history, click the Feeding America icon on the top left to return to the Home Screen.

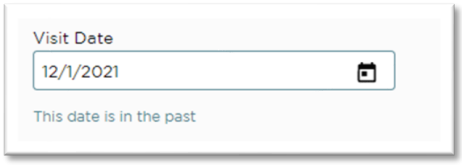
Add a Back-Dated Visit

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.

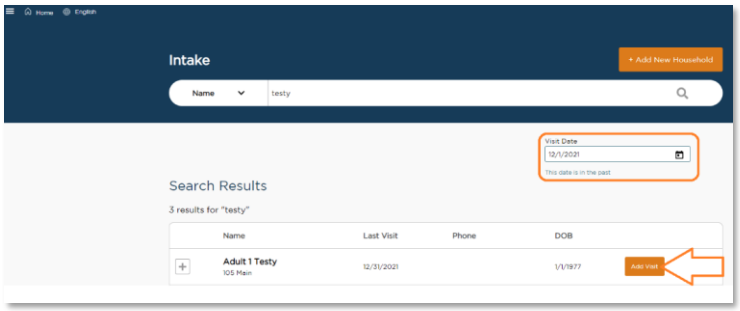
1. If the past Event has not yet been created, you will need to do that first.
2. From the home page, change the "Visit Date" on the calendar to the date of the past event.



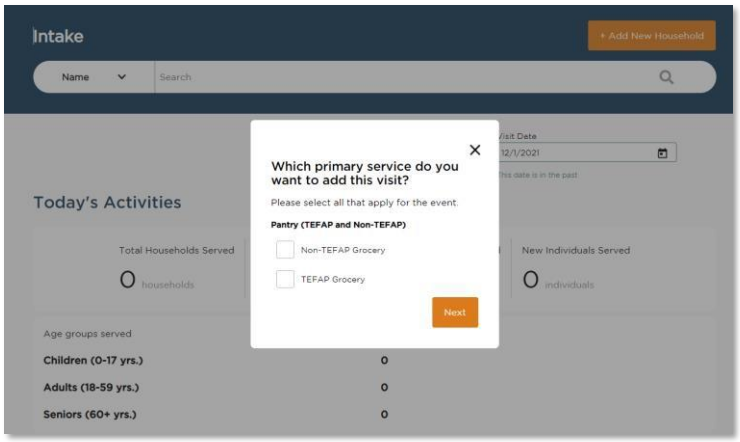
Once the date has been changed you will see a notification that "This date is in the past".



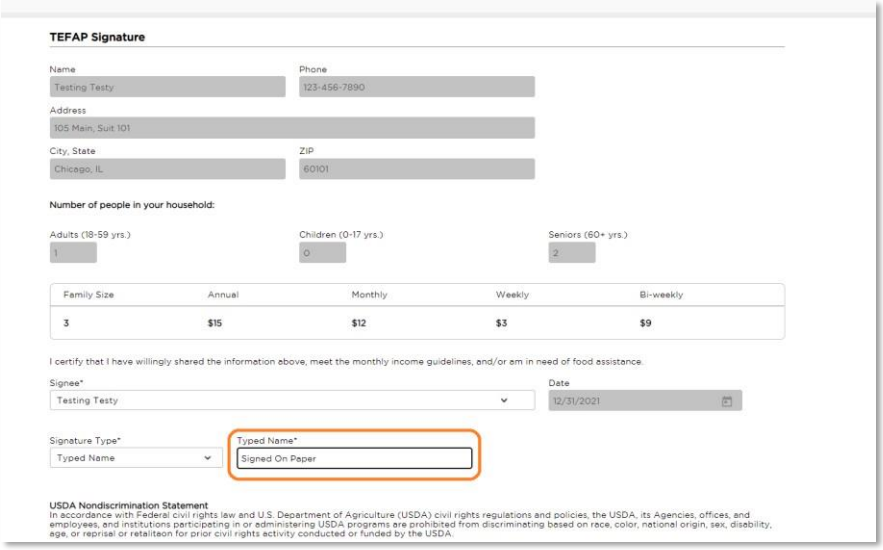
3. Search for or add your new neighbor (see "Add New Household" or "Add Return Visit" sections for more details.)



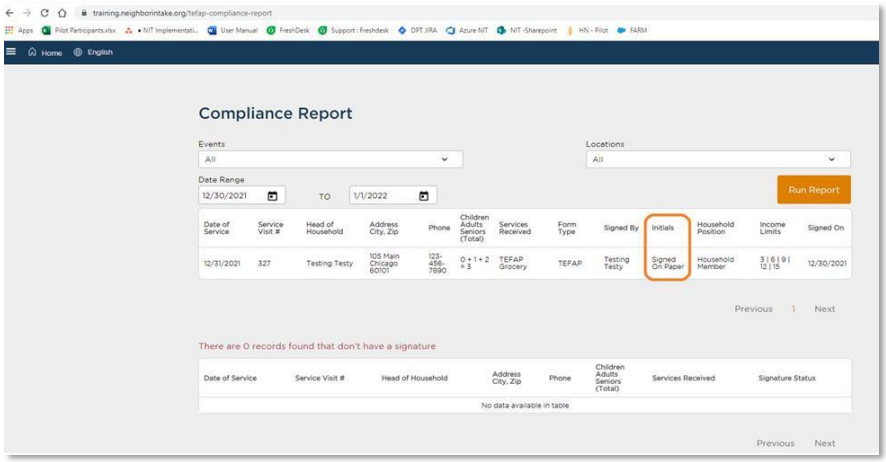
4. Select your primary service(s) (if a service is not available to you, check your Event configurations to make sure the event was set up for the visit date you have selected.)



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.

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

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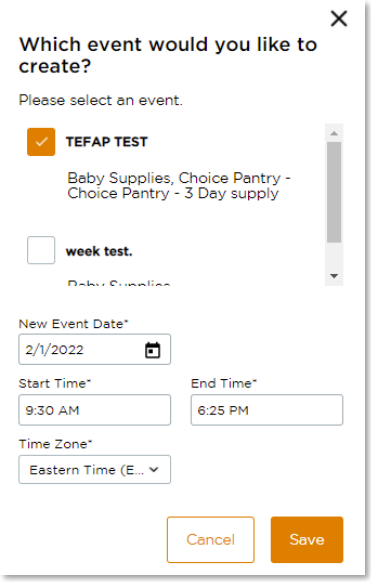
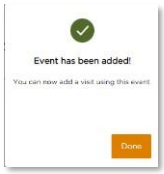
today's date but could also be a date in the past if you're adding a back-dated visit), start time, end time and time zone. Click the SAVE button.



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.

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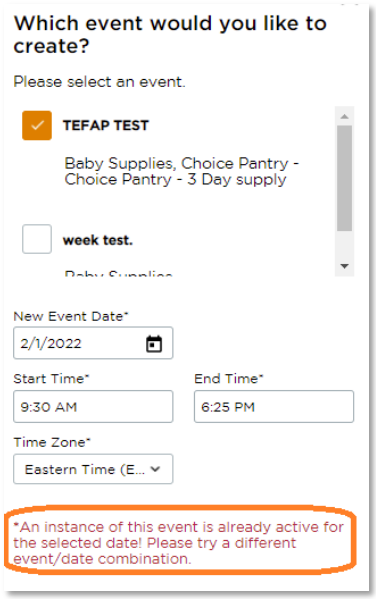
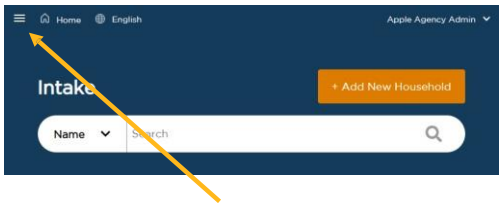
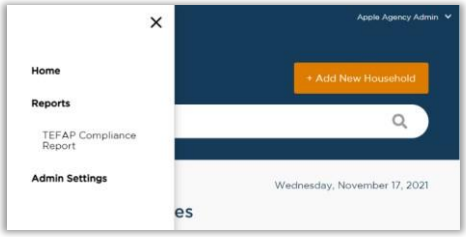


Agency Admin Settings

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.

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.

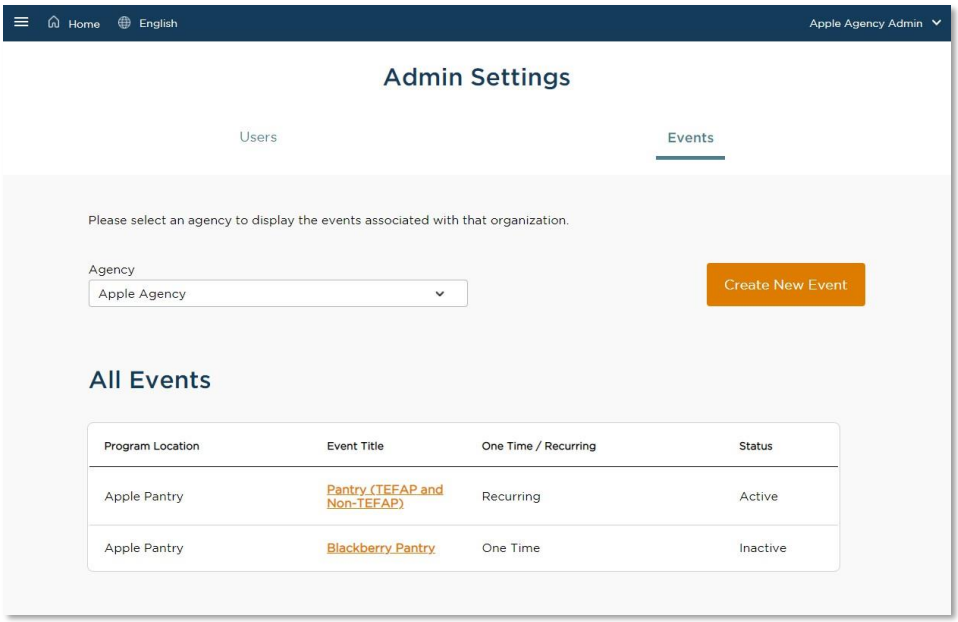
New Users
To gain new user profiles for your volunteers, contact Kbarthold@ceopeoplehelpingpeople.org.

Each volunteer should have their own user profile to ensure accountability with our clients' personal information. Only your active volunteers/staff should have access to Neighbor Intake. Contact WBFB staff to let us know if one of your agency's user profiles is no longer needed and should be deactivated.

EVENTS

Only users with the Agency Admin role can create/manage events. Generally, there is one Agency Admin at each Shopping Partner.

An event is a distribution at a specific program location. Each event is tied to one program location and can offer one or more primary and additional services. Each event also has a specific date(s) and time(s) for which it operates. Events can be reoccurring or one-time. A recurring event is one which occurs on a regular cadence at the same time and place (for example: a M-F pantry that occurs 10 am – 2 pm every day or a mobile pantry that occurs the third Saturday of each month from 1 – 5 pm). A one-time event is one that happens on a single date and time (for example a special holiday distribution).

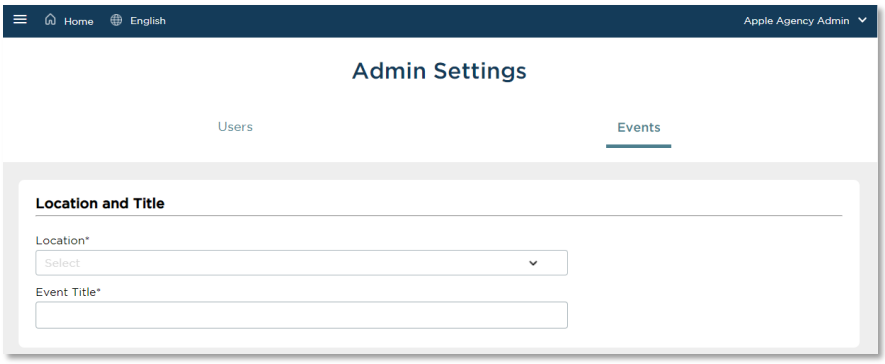


View all events

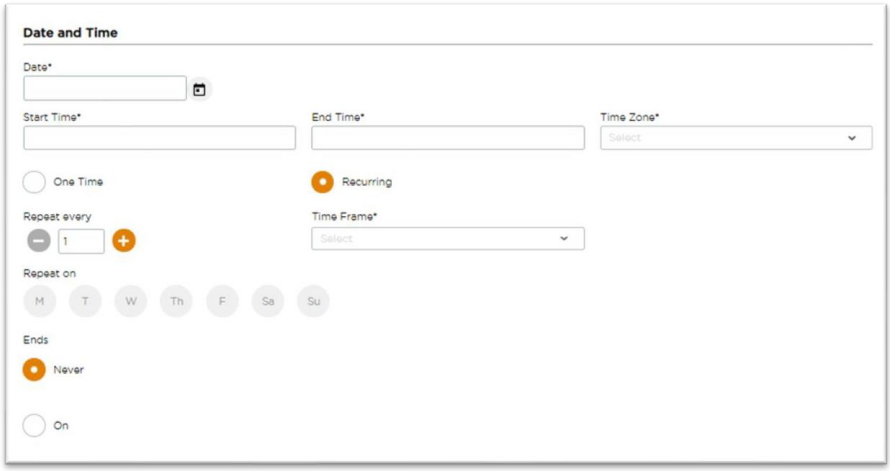
To view all events, navigate to the Events section in the Admin Settings. This will be a complete list of your agency's events that have been established by your food bank or your agency with some key information about those events. You will need to select your agency name from the Agency filter at the top to view the events for your agency.

Create a New Event

1. To create a new event, navigate to the Event section in the Admin Settings.
2. Click on the orange button that says Create New Event.
3. 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. If you do not see a program location for your agency reach out to your Foodbank administrator as they will have to add it for you.
    - Create a custom name for your event by typing into the Event Title field.
        - Examples: "Daily Pantry," "Third Thursday Pantry," "Saturday Market"

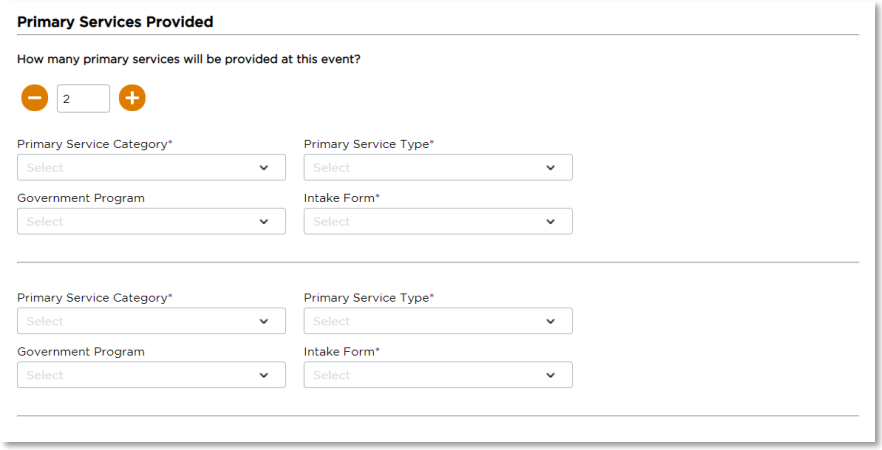


4. Complete the Date and Time section by filling in the following (* = required):
    - Date*
    - Start Time*
    - End Time*
    - Time Zone*
    - For Recurring Events only:
        - Recurrence/cadence of event
        - End date of event

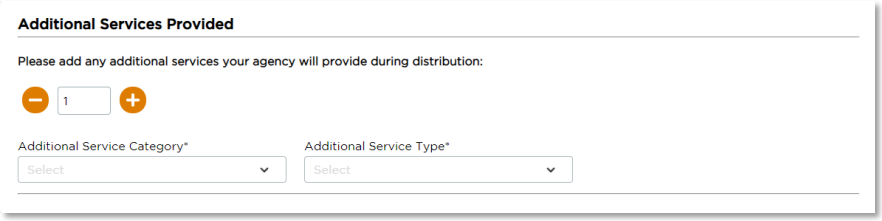


Note: you will be able to record visits during the entire day of an event; intake will not be restricted to the exact start and end time of the event.

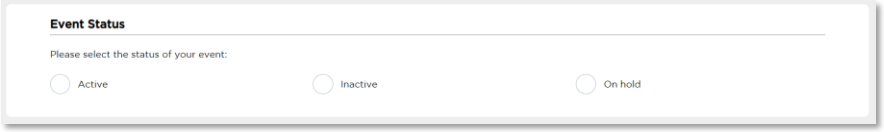
5. Complete the Primary Services Provided section. The Primary Service(s) are the main service(s) being offered at this event. Often this will be a regulated service such as TEFAP or a grocery distribution. There needs to be at least one primary service offered at each event. Use the + or – signs or 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 food bank 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 the food bank created and turned on in the food bank Services administration section.
    - Government Program: Only use this option if you are approved by WBFB to distribute TEFAP food. If your event offers TEFAP, select "The Emergency Food Assistance Program" from the dropdown. Otherwise, leave it blank.
    - Intake Form: This determines which form and flow the neighbors will encounter during their visit. Intake forms have been created by your food bank.
        - For general food distributions, use "Standard Intake Form."
        - If you distribute TEFAP, choose the correct intake form for your state.
            1. If you are in Virginia, select "VA TEFAP Form"
            2. If you are in DC, select "DC TEFAP Form"
            3. If you are in Maryland, select "MD TEFAP Form"



6. 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
    - Examples: Clothing, Furniture, Baby Supplies.
    - Additional Service Category: This is the highest level of categorization and aligns to the overarching Program Types in the food bank 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 the food bank created and turned on by the WBFB team.
        - We can create a custom name if desired, like "Sister Mary's Closet." Contact Kbarthold@ceopeoplehelpingpeople.org for assistance.



7. Complete the Event Status section by indicating if the event is *Active*, *Inactive*, or *On Hold*.

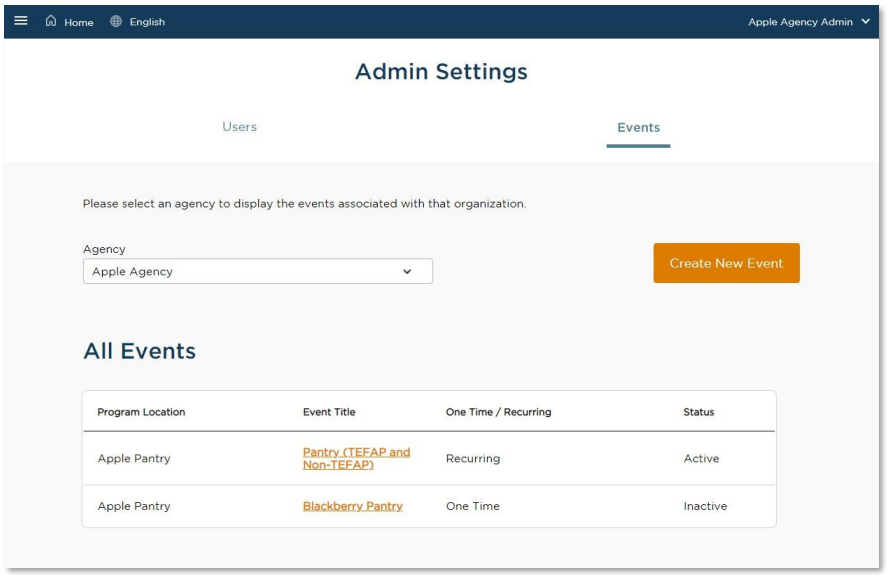


8. Scroll to the bottom of the screen and click Save.

Update or change the status of an existing event

Once an event has been created there may be a need to update it or change the status at a later time.

1. Navigate to the Event section in the Admin Settings.
2. On the complete list of events. You will need to select your agency name from the agency filter.



3. Click on the Event Title.
4. This will open the event details; where you can make any necessary updates.
5. If you need to change the status of an event, see the Status section. An event can have a status of Active, Inactive, or On Hold.
6. Scroll to the bottom of the screen and click Save.

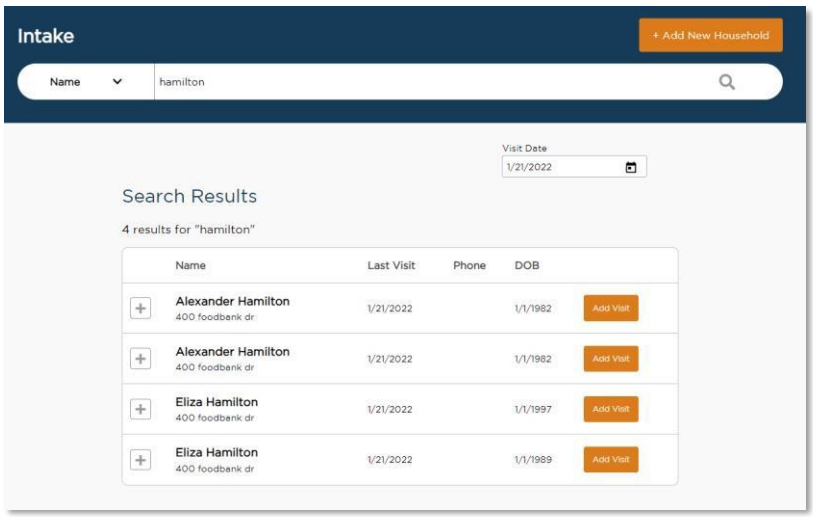
Duplicate Management

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 by your Weinberg Food Bank administrator. 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.

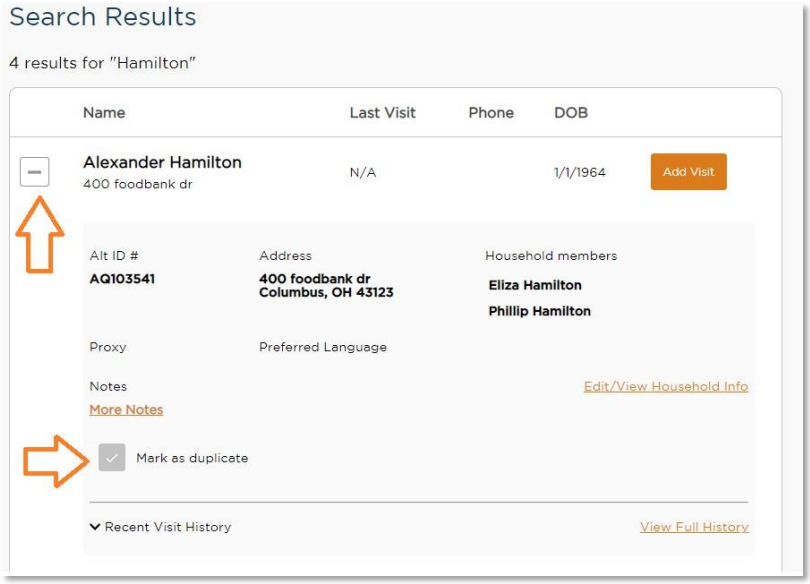
Identify a duplicated household during intake

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

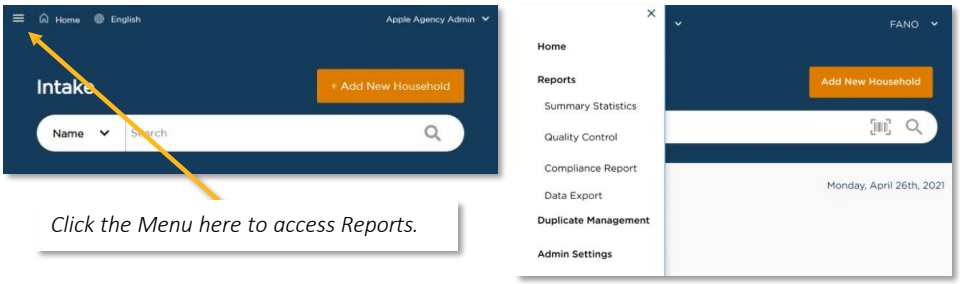


3. Click the box to "Mark as duplicate."
4. The household will be placed in the duplicate queue for review by a user with permissions to manage duplicates. Refer to the User section to review these permissions. Note: the flagged household will still appear in Search and the "Mark as duplicate" check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

Reports

The Reports section will help you and your agencies monitor and assess the progress of your Service Insights implementation efforts, audit TEFAP data for regulatory reporting purposes, and provide you with valuable insights about neighbors seeking services. These data and insights will help us drive conversations with stakeholders, enabling the entire Feeding America network to better meet the needs of our neighbors. Below is more detail about each of the key reports.

To access Reports, click on the Menu on the top left of the home screen.



Summary Statistics

The Summary Statistics report provides users with detailed data about neighbors, households, and the services provided. This report is made up of seven Tableau dashboards that each include several interactive visualizations.

These special Tableau reports are UNDER CONSTRUCTION and not yet available to users.

To access these reports, click the Menu at the top left of the home page and click on Summary Statistics. You can then click on the link for each report you want to view.

Summary Statistics

Upon clicking a report below, a new page will open in Tableau. This is a temporary function that will be improved in future versions of the application.

Name of report	Description
Snapshot Overview	Total individuals and households served, visits, and active programs by month
Individual Demographics	Individuals served by age, gender identity, and race or ethnicity
Core Household Characteristics	Households served, size, age composition, and government program participation
Other Household Characteristics	Household dietary factors, health, income, military status, living situation, etc.
Service Trends	Individuals and age groups served by week, month, day, and time of day
Geographic Breakdown	Number of programs, events, individuals and household served for all zip codes and counties
Agency Attributes	Status, service types, and individuals and households served by all programs and agencies

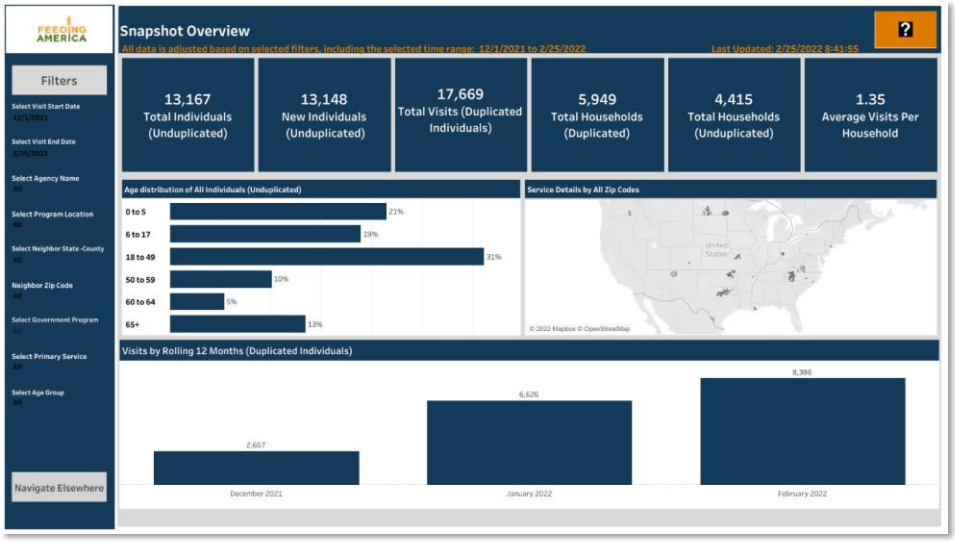
Clicking on the link will open another tab in your browser that will take you to Tableau Online.

These reports are not active yet and the following information is provided as a preview.

The seven dashboards are briefly described below.

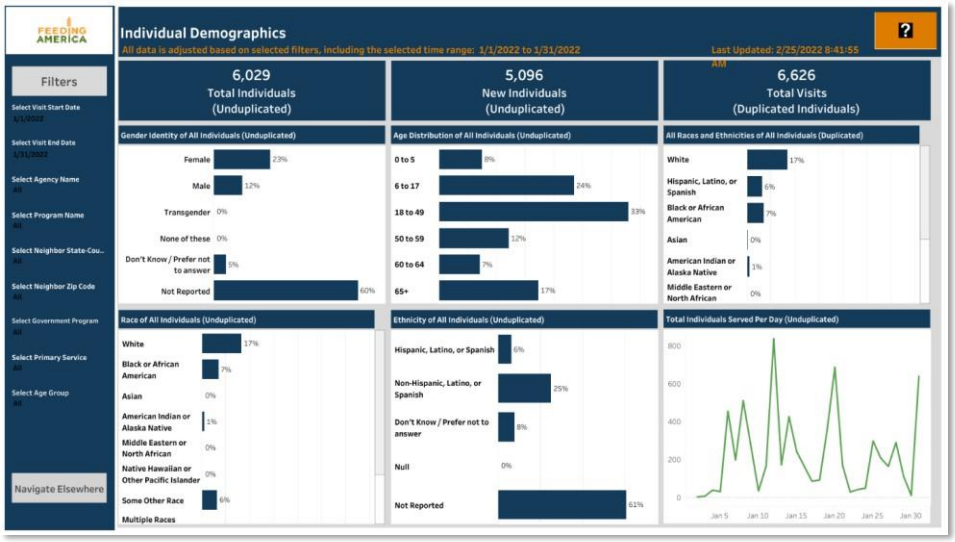
Snapshot Overview

Total visits, individuals and households served, and active programs by month.



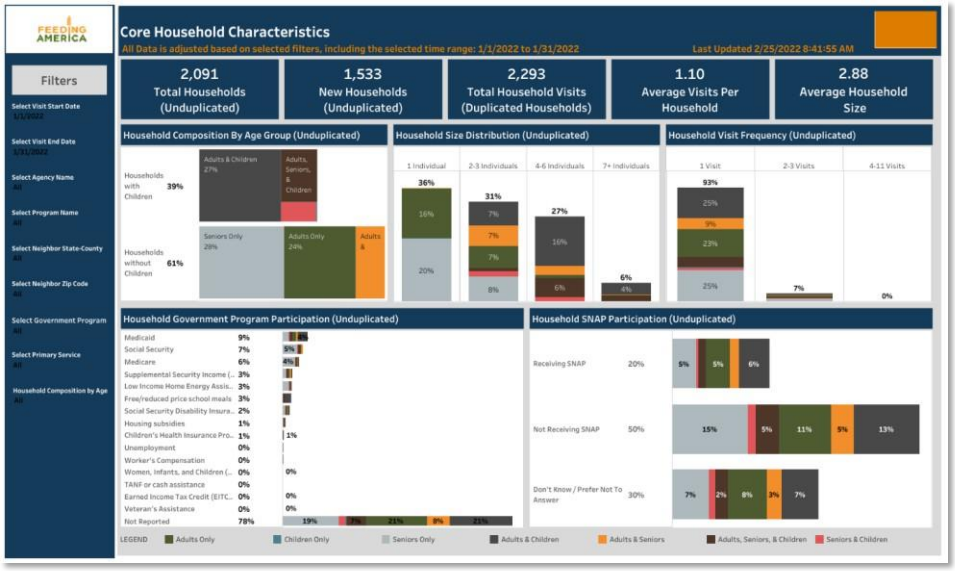
Individual Demographics

Individuals served by age, gender identity, and race or ethnicity.



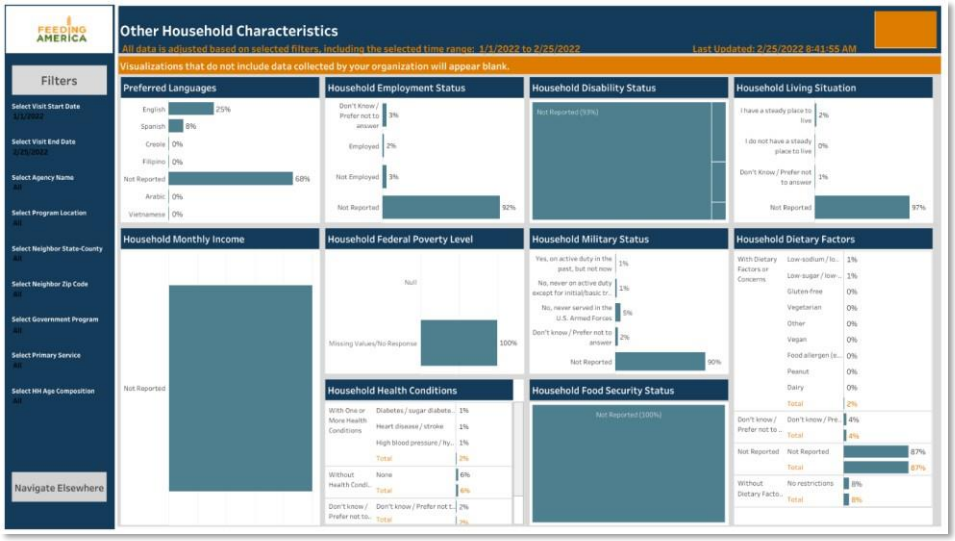
Core Household Characteristics

Households served, size, age composition, and government program participation.



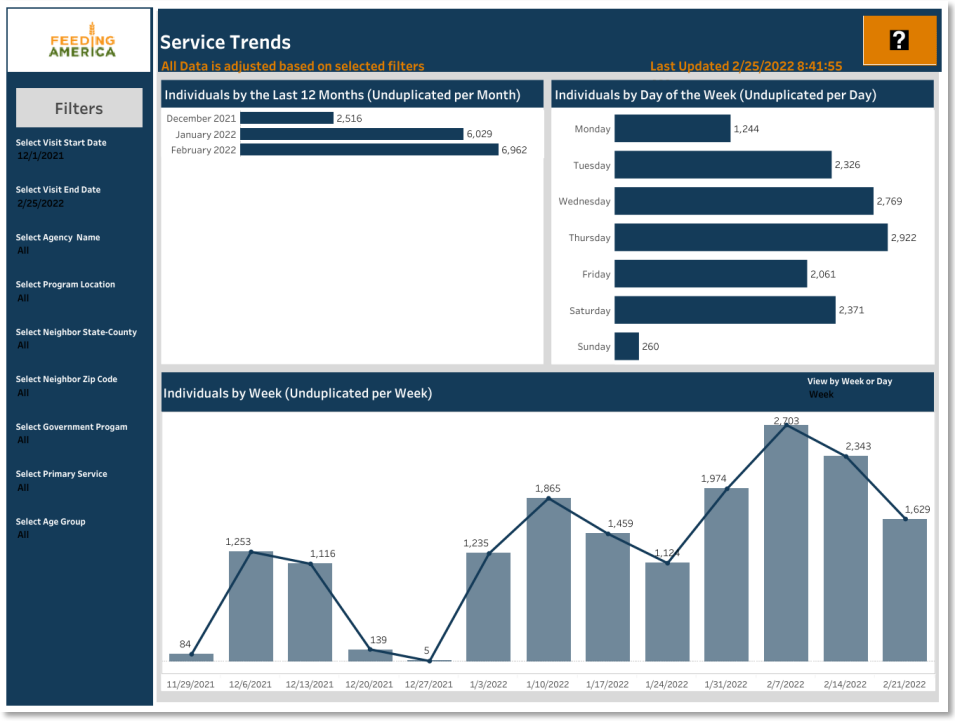
Other Household Characteristics

Household preferred language, employment status, disability status, living situation, monthly income, dietary factors, health conditions, military status, food security status, and federal poverty level.



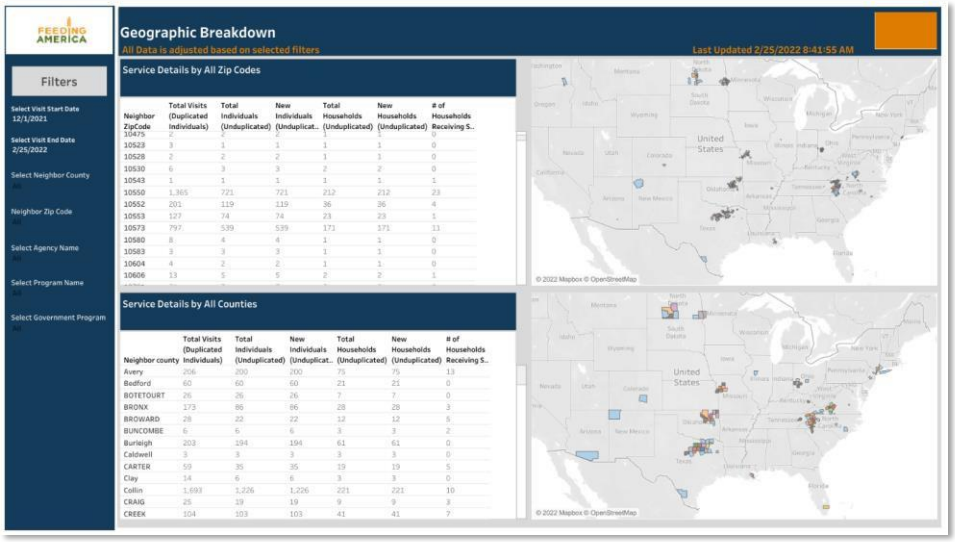
Service Trends

Individuals and age groups served by week, month, day, and time of day.



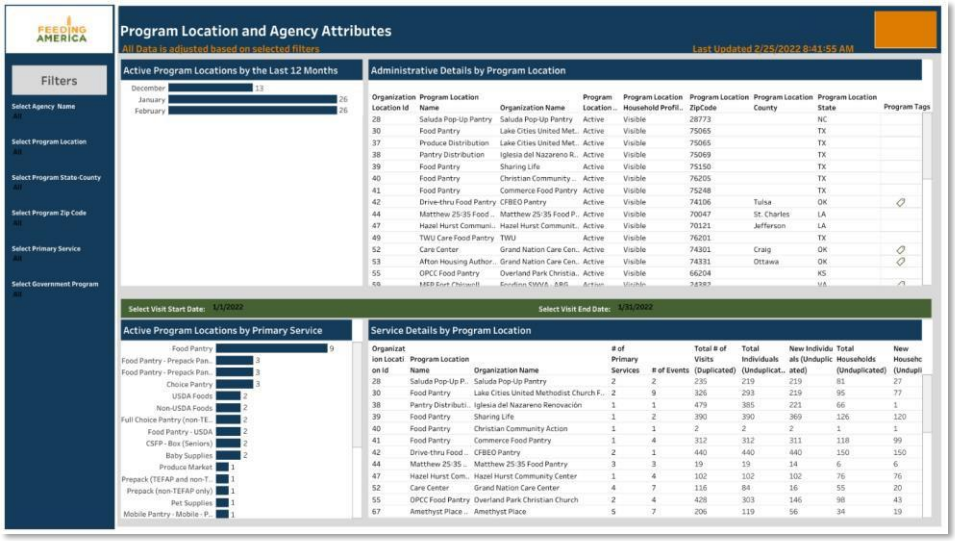
Geographic Breakdown

Number of programs, events, individuals, and household served for all zip codes and counties.



Program Location and Agency Attributes

Status, service types, and individuals and households served by all programs and agencies.



A few other important things to note about these dashboards:

- Users will or won't have access to reports based on their permissions. For example, a Viewer account will *only* have access to the Summary Statistics reports in Tableau. For more information on user permissions, see the Users section.

Permissions	Food Bank Admin	Food Bank User	Agency Admin	Agency User	Intake User	Viewer
Reporting						
Can view in-app reports (TEFAP Compliance, Quality Control)	x	x	x	x		
Can view Summary Statistics report in Tableau – *coming soon for agencies!*	x	x	x	x		x
Can save custom views of the Summary Statistics report in Tableau – *coming soon for agencies*!	x	x	x	x		
Can export deidentified neighbor and service data – *coming soon*!	x	x	x	x		
Can export identifiable neighbor and service data – *coming soon*!	x		x			

- The dashboards will only display data from your service area.
- Data is refreshed every night and will display data from the previous day.
- The Visit Start Date and Visit End Date filters default to the last full month. You can change this time range.
- Return to the Summary Statistics screen in the Neighbor Intake Platform to view a different report.
- The reports are optimized for desktop and tablet screens and may not display neatly on a mobile device.

Using Tableau

Tableau is data visualization software that allows users to connect to their data and then view or create interactive, shareable data images. Tableau easily visualizes data and makes it easier for people to see and understand what the data is saying. We are grateful for the Tableau Foundation's support and partnership to make these reports possible. We like to say, "A picture is worth a thousand spreadsheets." By using Tableau, we hope to empower users to make the most of their data to better serve neighbors.

Below are instructions for common functions that you will encounter in the Summary Statistics Tableau reports. For additional support, check out Tableau's helps pages here. If you have questions about Tableau that you cannot find answers to, please send an e-mail with as much detail as possible to faserviceinsights@feedingamerica.org.

Using Filters

Filters allow users to limit the data they see on Tableau visualizations in some way. When you determine what specific data you want to see, you can use the filters to include or exclude data from the reports. As you make your selections, you will notice that the metrics on the visualization change.

For example, you may be interested in viewing data on people who visited Agency X sometime between December 1, 2021 and December 31, 2021. You would use the Visit Start Date and Visit End Date filters to narrow in on this date range and the Agency Name filter to select Agency X. The data will dynamically change on the report to only show neighbors who visited Agency X within that date range.

Another example in the two images below: the Individual Demographics report is filtered from the default view (image 1) to only displaying data from neighbors living in Broward County, FL (image 2). *Note: these images feature fake data and do not accurately reflect real data from Broward County, FL.*

IMAGE 1: DEFAULT VIEW

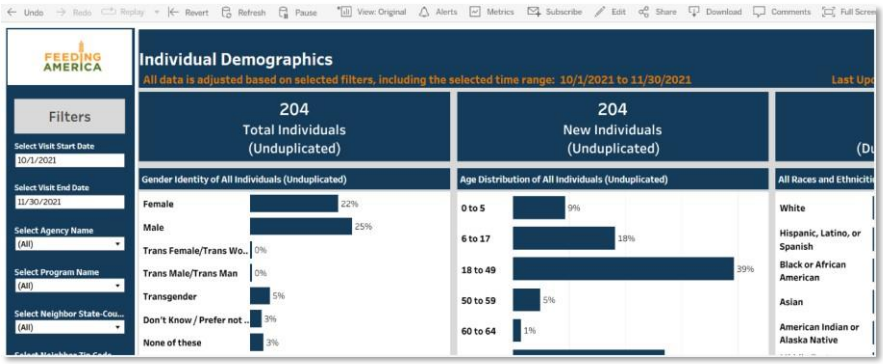
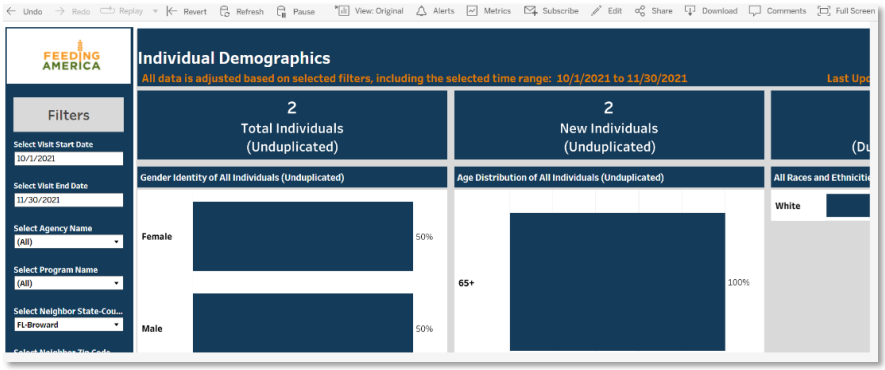


IMAGE 2: REPORT FILTERED BY NEIGHBOR STATE & COUNTY TO DISPLAY BROWARD COUNTY, FL

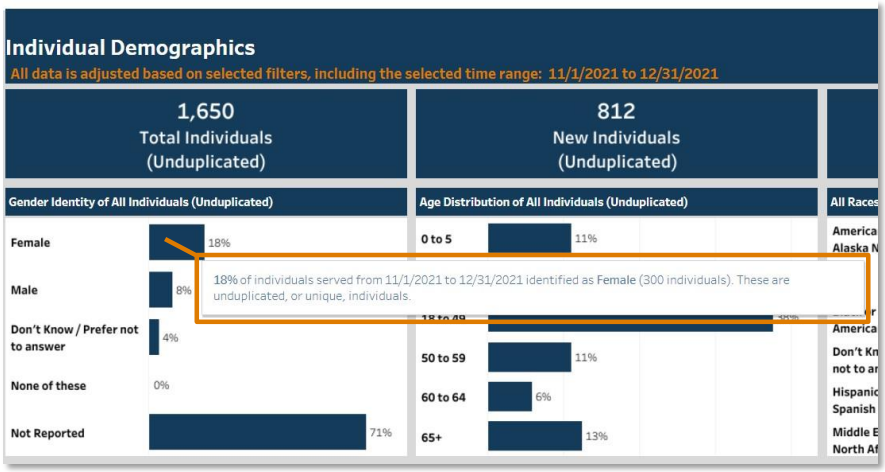


For more information on filtering data on the dashboards, visit the Tableau website here.

Tooltips

Tooltips help users see more information about specific data points in the Tableau reports. If you hover your cursor over a data point or chart, a tooltip appears showing more information.

For example, the below tooltip shows more information about female neighbors served. If you hover over the blue bar next to Female, the tooltip appears.



Expanding and Collapsing Data

Some visualization can be expanded to view more detailed information.

For example, on the Core Household Characteristics report, the categories in the Household Size Distribution (Unduplicated) visualization can be expanded. If you hover your mouse over "1 Individual," you will notice a small box with a "+" sign in it. Click on the plus sign, and the data will expand to show more detailed information on the distribution of household size by the age of the people who live in each household. If you hover over "1 Individual" again (which has moved from the bottom to the top of the visualization), you will notice that the box now has a "-" sign in it. Click on it to return the data to its original view.

Custom Views

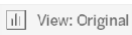


Tableau allows you to save custom views of the data you want to see so you do not have to apply filters every time you visit the data dashboard. For example, let's say you want to pull a monthly report of visitation for all of your mobile pantries using the Individual Demographics dashboard. Instead of applying a filter every time you visit the dashboard, you can save your filters as a custom view so you only see the data that pertains to your food bank or agency. After you have created a custom view, you can click the Share (see below) button in the toolbar to share it with other users. Anyone with the same Tableau permissions as you should be able to see the custom views you have built. Click here for more instructions on how to create a custom view of your data.

Data Alerts

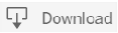
If you want to know when your food bank's or agency's data hits a specific threshold, you can use data alerts to automatically notify you. For example, if you want to know when your agency serves 200 households, you can set an alert to automatically email you when the 200th household has been entered into the system. For more information on how to set data alerts, click here.

Share

Sharing allows you to send dashboards to others. Other users must have permission to view the content you share with them. You can share dashboards using two different methods after clicking the "Share" button on the dashboard. First, you can type the contact information of other Tableau users into the "Share with people" box; the users that have permission to look at the dashboards will automatically populate in a list once you start typing. When you click "Share," the users you typed in will receive a link to the dashboard in their e-mail. Second, you can click "Copy link" and then paste it into an e-mail, direct message, or other electronic means. It is important to note that if you adjust the dashboards with filters and then share them, the recipients will see the dashboard

with all of the filters you engaged. For more information on sharing dashboards with others, click here.

Download



The download option gives users the ability to access image, PDF, PowerPoint, and Excel versions of the dashboard or a specific viz in a dashboard. After clicking "Download," you are presented with several file options from which to choose. Click on your preferred file type. Under the "Include" dropdown menu you can choose "This View" (which will create downloadable view of the whole dashboard) and "Specific sheets from this dashboard" (which will create downloadable views of specific vizzes from the dashboard). Make your selection and then click "Download." For more information on the download options available, click here.

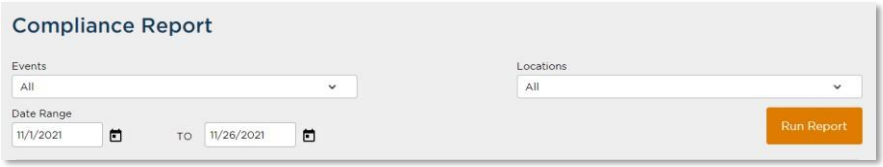
Full Screen

The full screen button puts the dashboard into full screen mode, which removes your browser components from view. To exit full screen mode, press the ESC key.

TEFAP Compliance Report

If your food bank has received regulatory approval to capture TEFAP signatures through this platform, this report will aid in your compliance and audit reporting.

This report can be filtered based on Event, Program Location and Date Range. Once you have selected your filters click the orange Run Report button.



Two tables will appear, the first includes information about TEFAP services that have a signature. These services are compliant and unlikely to need review. Information on this table includes household information captured at the time of service:

- Date of service
- Service Visit #
- Head of Household
- Address City, Zip

- Phone
- Children, Adults, Seniors (Total)
- Services Received
- Form Type
- Signed By
- Initials
- Household Position
- Income Limits
- Signed On

The second table contains services that are without a signature. These services could highlight a potential issue of non-compliance for your regulated programs. Any services listed on the second table may need review. This table includes:

- Date of service
- Service Visit #
- Head of Household
- Address City, Zip
- Phone
- Children, Adults, Seniors (Total)
- Services Received
- Signature Status

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

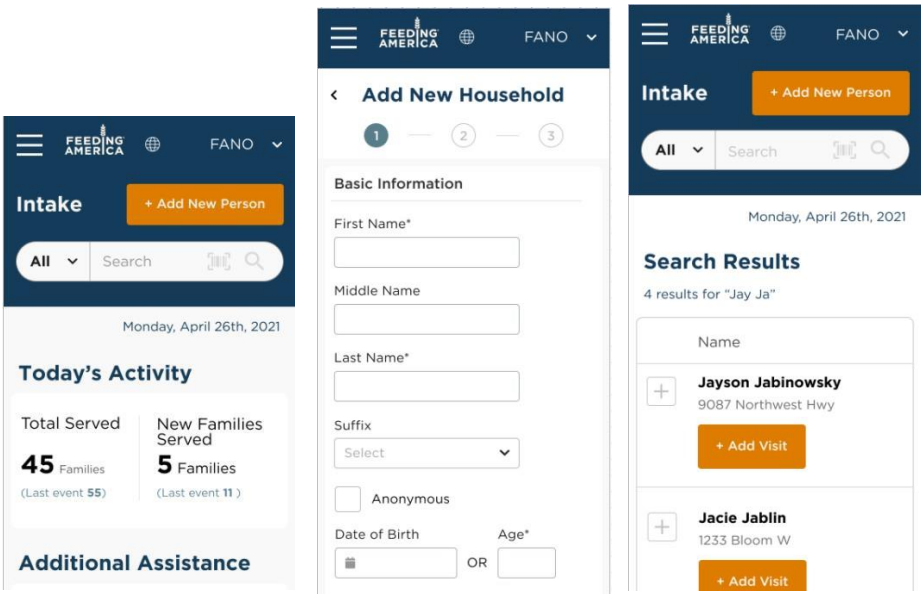
- iOS 10.3.4 or higher
  - Safari (up to date)
  - Google Chrome (up to date version)
  - *Device example: iPhone*
- Android 10 or higher
  - Google Chrome (up to date version)
  - *Device example: Samsung Galaxy S21*

Other Devices

- Barcode scanner
  - There are many peripheral barcode scanner 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 neighbor intake 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:



FAQs – Coming Soon!

Coming soon!

Need help?

We are here to support you!

Contact Kyle Barthold at Kbarthold@ceopeoplehelpingpeople.org