

Service Insights on MealConnect



Before you START!

Please read this sheet to avoid common errors.

1. Use your **unique login**.

Please use YOUR OWN assigned login. If you do not have one, contact your Pantry Director/Supervisor. Users can be added in Admin Settings > Users.

2. Enter visits on the **correct date**.

When adding a visit, double check to make sure the date is correct.



Visit Date

1/9/2023

This date is in the past.

3. **Search** before adding new neighbors!

Search to see if the person already exists in the system. **They may have visited another partner agency!**

4. Search Tips:

Don't search by full name! Look up a partial name to widen your search and account for misspellings.

For example, instead of Fred Flintstone, try searching:



5. Add only **OTHER** household members in the Household Section.

Do not add the Head of Household again in the Household Section.

6. Add **race and gender** for EACH person.

Race and gender are hidden in the Additional Info dropdown.



Suffix: Select

*Date of Birth: 11/5/1979

Additional Info

Status: Inactive

*First Name: Amy

7. **Someone moved out?**

Mark household members that have moved out as "Inactive".

Check for inactive people before adding a new person to the household.



8. Neighbor didn't answer the question?

You can leave optional questions blank. You do not need to mark "Don't Know / Prefer Not to Answer" for each question. The required SNAP question is the only question that must be marked "Don't Know / Prefer not to answer" if the neighbor has not answered the question.

9. Just need to update the household without processing a visit?

Search for the neighbor's name, then click the plus sign next to their name. Click **View Household Info**.

10. Made a mistake?

Wrong date? Wrong household count? Something else? You can **cancel a visit** in "Visit History". **Remember to re-add the visit with the correct information!**

The screenshot shows a user profile for 'Computer Mouse' with the following details:

- Name: Computer Mouse
- Address: 789 N Edwards 21, Wichita, KS 67203
- Household Count: 3
- Visit Date: 9/6/2023
- Registration Date: 5/5/2001
- Alt ID #: AS101397
- Household Members: Fred Mouse, Bill Mouse
- Proxy: N/A
- Preferred Language: N/A
- TEFAP Status: ELIGIBLE [Recertification date]
- Notes: Includes icons for a box and a leaf, and a link for 'More Notes'.
- Buttons: 'Add Visit', 'View Household Info', 'Mark as duplicate', 'Reserve For Future Event', and 'View Full History'.

Annotations on the screenshot include:

- A red circle around a minus sign icon in the top left corner.
- A red arrow pointing from the minus sign icon to the 'View Full History' link at the bottom right.
- A green circle around the 'View Household Info' link.
- A green arrow pointing from the 'View Household Info' link to the left.

11. Questions? Need Help?

Email SIMC@careandshare.org or check with your agency administrator!