



# Intake Training Worksheet

## Minnesota Partner Agencies

Adding neighbor information into the Service Insights on MealConnect platform is straightforward but becomes easier and faster with practice. Please repeat each section as many times as you would like to feel comfortable adding the information.

### Logging In

1. Visit the website: [training.neighborintake.org](https://training.neighborintake.org).
2. Login using the following information:
  - a. Username: pantryvolunteer
  - b. Password: Pantry2022

### Exercise A: Adding an Existing Household

1. Search for Teddy Roosevelt in the SI/MC system, using the following search options.
  - a. By last name: roosevelt
  - b. By last name and first name: roosevelt, teddy
  - c. Using only the first three letters of the last and first name: roo, ted
2. Review the information about Teddy's household that you can view from the search screen.
3. Add the visit for Teddy, walking through all four tabs.
  - a. Eligibility
  - b. Signature
  - c. Household Info
  - d. Finish Visit
4. Review the steps under the *Adding the Visit – Existing Household* of the [Adding a Visit](#) document if needed for questions.

### Exercise B: Adding a New Household

1. Search for yourself or a random name within the database, using the following search options.
  - a. By last name
  - b. By last name and first name
  - c. Using only the first three letters of the last and first name
2. Add yourself or another person to the database walking through all four tabs. Please note that while everything in the database is secure, it is viewable by other people within the Great Plains Food Bank network, so please do not include sensitive information.
  - a. Eligibility
  - b. Signature



- c. Household Info
  - d. Finish Visit
3. Review the steps under the *Adding the Visit – New Household* of the [Adding a Visit](#) document if needed for questions.