

Service Insights: Adding a New Household

Updated July 2026



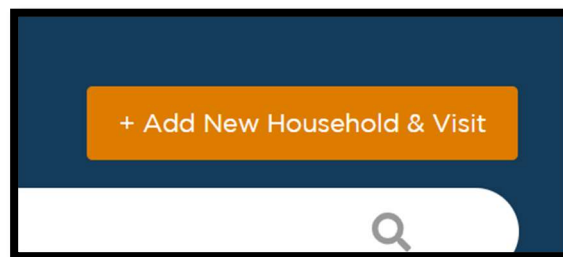
**Before adding a new household, ALWAYS be sure to search for the Neighbor.
It's possible that the household is already in the system.**

Entering New Clients

First, make sure the date is the correct date of their visit. The system will default to Today's current date. If you need to change the date, click the calendar icon in the date box and choose the appropriate date.

A screenshot of a web form showing a "Visit Date" field. The field contains the date "6/11/2026". To the right of the date is a small calendar icon. A red arrow points upwards to the calendar icon.

If a neighbor is new to the system (meaning you were unable to find them), on the Dashboard, click the orange + Add New Household & Visit button



On the Primary Service Pop-Up, choose the Food Pantry option.

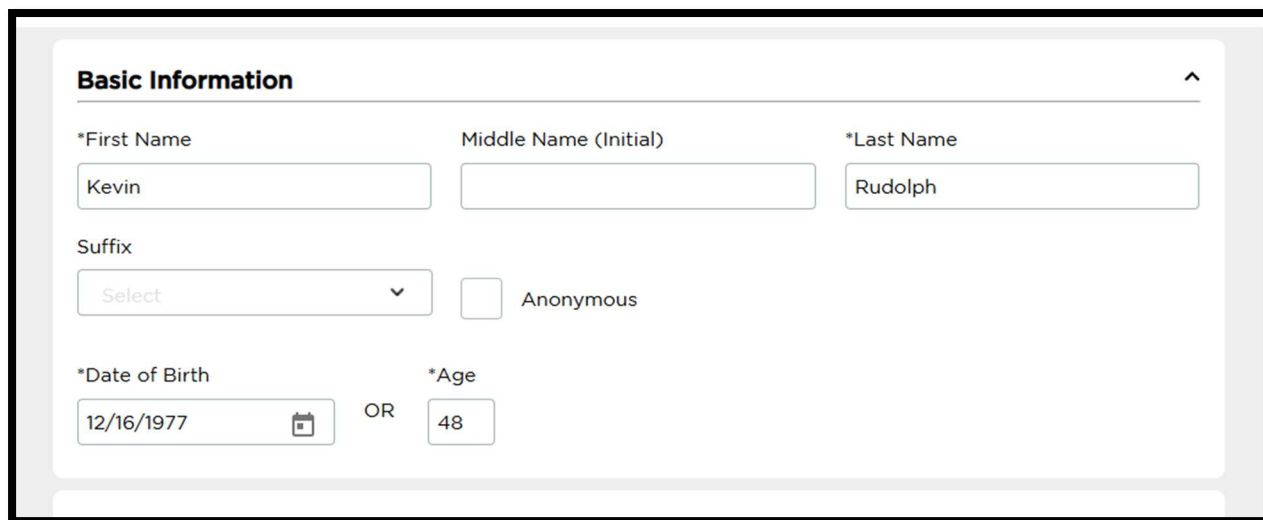
A screenshot of a "Primary Service Pop-Up" form. The title is "Which primary service do you want to add this visit?". Below the title is the instruction "Please select all that apply for the event." Under the heading "Food Pantry", there are four checkboxes: "Food Pantry" (checked), "Baby Supplies", "Clothing", and "Education Assistance". At the bottom right of the form is an orange "Next" button.

Then click Next to go into the empty profile. Using the completed Service Insights Intake form, fill out the appropriate information as given by the neighbor. Do not assume anything. If they leave the question blank, select “Don’t Know” and make a note to get that information the next time they come in.

The first page is all the information USDA requires for TEFAP eligibility and certification. For questions on this, please refer to the “TEFAP Certification Guide in SI.”

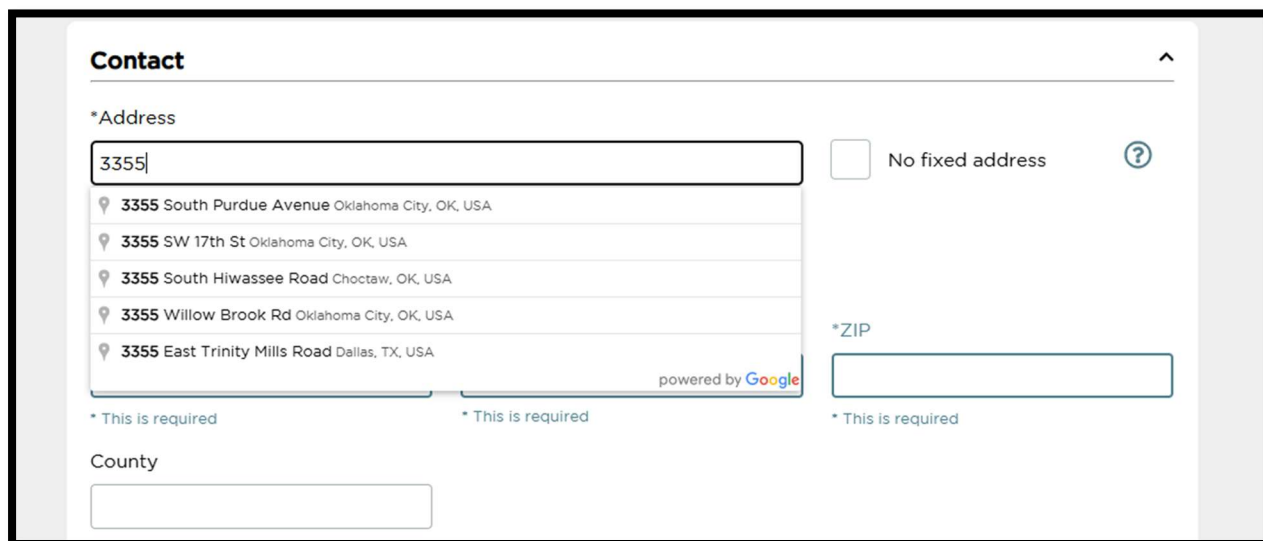
The Basic Information Fields

Use the additional name fields to record middle initials and any suffixes (e.g., Jr., Sr.) when provided. For Date of Birth, age is acceptable; however, for the head of household, collecting the full birth date is preferred. This makes it easier to accurately locate them on future visits, especially when names are common.



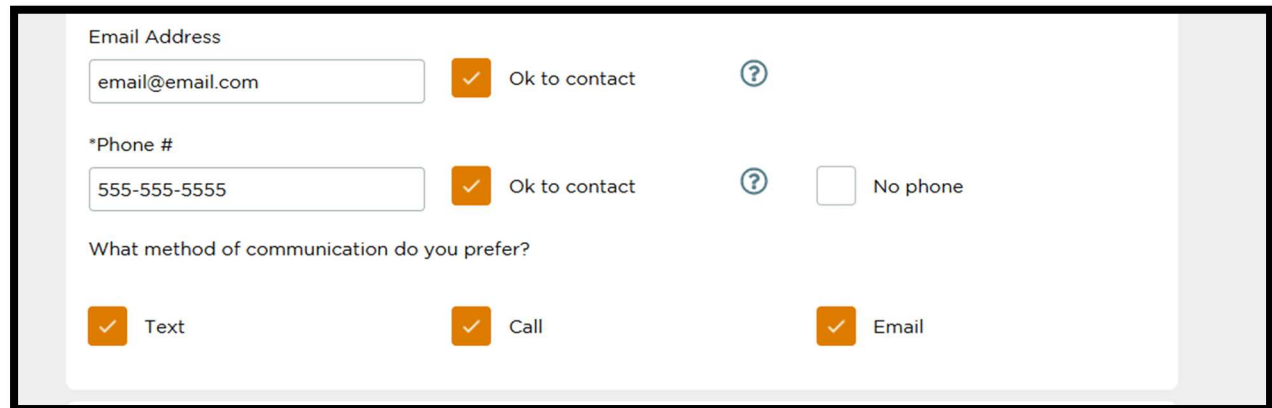
The screenshot shows the 'Basic Information' section of a form. It includes fields for *First Name (Kevin), Middle Name (Initial) (empty), and *Last Name (Rudolph). There is a Suffix dropdown menu (set to 'Select') and an 'Anonymous' checkbox. Below these are fields for *Date of Birth (12/16/1977) and *Age (48), separated by an 'OR' label. A small calendar icon is next to the date field. The form is titled 'Basic Information' with an upward arrow icon.

From there you will fill out the **Contact sections** including the address and contact information. As you type the address, a dropdown of suggested matches will appear—select the correct option to auto-fill the remaining fields. If no suggestions appear, manually enter the full address, ensuring the county, city, state, and ZIP code are accurate.



The screenshot shows the 'Contact' section of a form. It features an *Address field with a dropdown menu showing suggestions for '3355' (e.g., '3355 South Purdue Avenue Oklahoma City, OK, USA'). To the right is a 'No fixed address' checkbox and a help icon. Below the address field is a *ZIP field. At the bottom is a County field. Each of these three fields has a red asterisk and the text '* This is required' below it. The form is titled 'Contact' with an upward arrow icon. A 'powered by Google' logo is visible at the bottom right of the address suggestions.

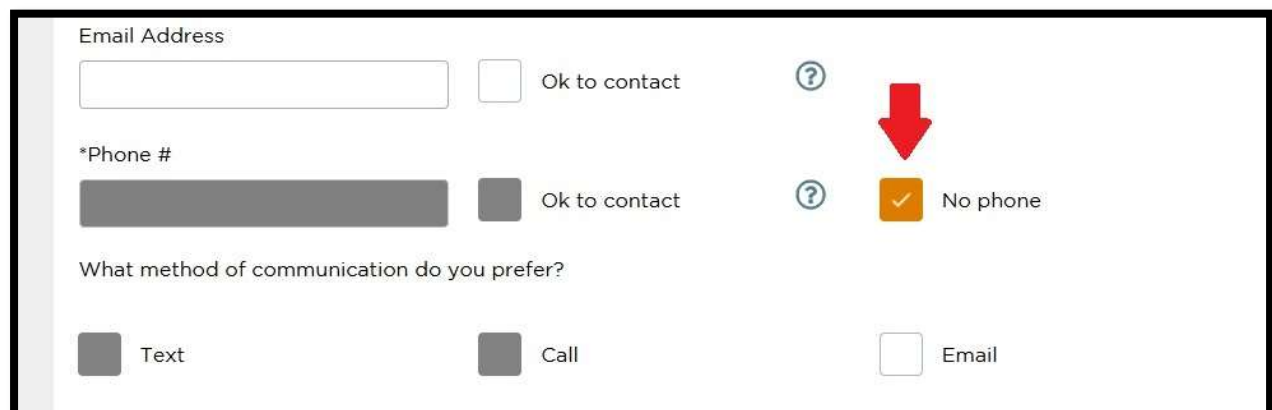
In the contact information section, indicate whether it is okay to contact the individual by selecting the appropriate boxes. This allows Feeding America to send a one-time text or email with the client ID (Alt ID), which helps streamline check-in at future visits. See the example below of the ID they receive.



This screenshot shows a contact information form where all contact permission options are selected. The 'Email Address' field contains 'email@email.com'. The 'Ok to contact' checkbox is checked. The '*Phone #' field contains '555-555-5555', and its 'Ok to contact' checkbox is also checked. A 'No phone' checkbox is present but unchecked. Under the heading 'What method of communication do you prefer?', the checkboxes for 'Text', 'Call', and 'Email' are all checked.



If they do not have a phone you will use the No Phone checkbox. If the individual does not consent to being contacted, ensure all contact permission boxes remain unchecked.



This screenshot shows the same contact information form, but with all contact permission options unchecked except for 'No phone'. The 'Email Address' field is empty. The 'Ok to contact' checkbox is unchecked. The '*Phone #' field is redacted with a grey bar, and its 'Ok to contact' checkbox is unchecked. The 'No phone' checkbox is checked, and a red arrow points to it. Under the heading 'What method of communication do you prefer?', the checkboxes for 'Text', 'Call', and 'Email' are all unchecked.

Gender and Race/Ethnicity

Record the individual's self-identified gender. If none of the listed options apply (e.g., non-binary), select "None of these." In the Race and Ethnicity section, individuals may select multiple options to reflect mixed backgrounds.

The image shows two sections of a form. The first section, titled "Gender Identity", asks "What gender do you identify as?". It has five radio button options: Male (selected), Female, Transgender, None of these, and Don't Know / Prefer not to answer. The second section, titled "Race / Ethnicity", asks "What race or ethnicity do you identify as?". It has nine checkbox options: White (checked), Asian, Native Hawaiian or Other Pacific Islander, Hispanic, Latino, or Spanish, American Indian or Alaska Native (checked), Some other race or ethnicity, Black or African American, Middle Eastern or North African, and Don't Know / Prefer not to answer.

In the Household section, use the orange plus sign to designate the number of household members and create ready-made spaces for them to be added.

The image shows the "Household" section of a form. It asks "How many active people in your household, not including yourself, will benefit from the services provided today?". There are three groups: Adults (18-59 yrs.) with a minus sign, a box containing "1", and a plus sign; Children (0-17 yrs.) with a minus sign, a box containing "0", and a plus sign; and Seniors (60+ yrs.) with a minus sign, a box containing "0", and a plus sign. A red arrow points to the plus sign for the Adults group. Below this, there is a "Remove #1" link. The form then asks for details for the first adult: *Status (Active), *First Name (Rufus), Middle Name (Initial) (empty), *Last Name (Rudolph), Suffix (Jr), *Date of Birth (5/28/2020), OR *Age (6). There is an "Additional Info" link and an "Add Adult" button at the bottom.

The Household Member Status drop down is defaulted to Active, when entering for the first time, they should be active members of the household. If they move out later, you can switch that to inactive which takes them out of the household.

- **Active** means they are living in the household and are an active part of it.
- **Permanently inactive** means they have moved out and will not return such as getting a home of their own.
- **Inactive**, means they are temporarily moved out of the home such as in a custody schedule.

Note, if you accidentally clicked “Add Adult” and entered in a child or a senior, the system will auto correct it, based on the age/date of birth entered.

The screenshot shows a web form titled "Household" with a sub-header "How many active people in your household, **not including yourself**, will benefit from the services provided today?". Below this are three counters: "Adults (18-59 yrs.)" with a value of 1, "Children (0-17 yrs.)" with a value of 0, and "Seniors (60+ yrs.)" with a value of 0. Each counter has minus and plus buttons. Below the counters is a section titled "Adults" with a "Remove #1" link. The form fields for the first adult are: "*Status" (dropdown menu set to "Active"), "*First Name" (text field with "Rufus"), "Middle Name (Initial)" (text field), "*Last Name" (text field with "Rudolph"), "Suffix" (dropdown menu set to "Jr"), "*Date of Birth" (calendar icon with "5/28/2020"), "OR", and "*Age" (text field with "6"). At the bottom left is a blue "Add Adult" button. To the right of the "Add Adult" button is a link "Additional Info" with a downward arrow icon. A red arrow points to this "Additional Info" link.

You'll want to click the **Additional Info** arrow to bring up the Gender and Ethnicity fields. Like with the head of household, individuals can have multiple options for race/ethnicities. (see screenshot on next page)

[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

[Add Adult](#)

If you need to add another household member, simply click the orange Add Adult button. It doesn't matter if it is a child or senior, the system will correct the category they should fall into based on the date of birth or age entered.

[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

[Add Adult](#) 

SNAP and Other Government Programs

If a neighbor is hesitant to answer these questions, please explain that collecting this information helps ensure their household is connected to all available resources to support their food needs.

SNAP Benefits

*Is anyone in your household currently receiving SNAP or food stamps? 

☒ Yes ☐ No ☐ Don't Know / Prefer not to answer

Other Government Programs

Does anyone in your household currently receive benefits through the following government programs? 

☐ Food Distribution Program on Indian Reservations 	☐ Free/reduced price school meals 	☐ Housing subsidies 
☒ Medicaid 	☐ Medicare 	☐ Housing Subsidies
☐ Commodity Supplemental Food Program 	☐ Social Security 	☐ Social Security Disability Insurance (SSDI) or disability payments 
☒ Supplemental Security Income (SSI) 	☐ TANF or cash assistance 	☐ Unemployment 
☐ Veteran's Assistance 	☐ Women, Infants, and Children (WIC) 	☐ Worker's Compensation 
☐ None	☐ Don't know / Prefer not to answer	☐ The Emergency Food Assistance Program

Employment Status and Disability Status

Both are yes or no questions.

Employment Status

'In the last month, did you or anyone in your household work for pay full-time (for 30 hours per week or more)?

☐ Yes ☒ No ☐ Don't Know / Prefer not to answer

Disability Status

Does anyone in your household, including yourself, have a disability that prevents them from accepting any kind of work during the next six months?

☒ Yes ☐ No ☐ Don't know / Prefer not to answer

Household Monthly Income

This is the **monthly** gross income for all members of the household. Enter in the selected household **income** range from the intake form.

Please note, Oklahoma is a self-declare state, so proof of income is not required; however, an income range should still be provided.

Defined: Gross income represents income from all sources before deducting expenses or taxes. Income sources include money from jobs, net income from business, farm or rent, pensions, dividends, interest, social security payments, and any other money income received by all members of the household.

Household Monthly Income

Which category represents the total income of all members of your household in a typical month? ?

☐ Zero	☐ Less than \$500	☐ \$500 - \$999
☒ \$1,000 - \$1,999	☐ \$2,000 - \$2,999	☐ \$3,000 - \$3,999
☐ \$4,000 or more	☐ Don't know / Prefer not to answer	

Military Status

This is for anyone who is now, or has in the past, served in the US Armed Forces and National Reserves or National Guard.

Note: the first response (Yes, on active duty in the past, but not now) will capture Veteran status.

Military Status

Has anyone in your household, including yourself, served on active duty in the U.S. Armed Forces? Active duty includes serving in the U.S. Armed Forces as well as activation from the Reserves or National Guard.

☒ Yes, on active duty in the past, but not now	☐ Yes, now on active duty	☐ No, never on active duty except for initial/basic training
☐ No, never served in the U.S. Armed Forces	☐ Don't know / Prefer not to answer	

Dietary Restrictions

Use this field to record any dietary restrictions for each household. This information helps guide sourcing so we can better match available items to community needs. For example, if many neighbors indicate “Low Sugar,” prioritize selecting low-sugar or diabetic-friendly options. If no dietary restrictions are provided, select “None.”

Dietary Restrictions ^

Dietary Restrictions (check all that apply) ?

☐ Difficulty Chewing or Swallowing	☐ Difficulty Cutting Foods	☐ Food Allergies
☒ Gluten Free	☐ Halal	☐ Kosher
☐ Low Sodium	☒ Low Sugar	☐ Microwave/Limited Cooking Only
☐ Vegan	☐ Vegetarian	☐ Other
☐ No Restrictions	☐ Don't know / Prefer not to answer	

Proxy

This is the person who has permission to pick up food for the household, typically they live outside of the household. The only required fields for a Proxy are the name and phone number, everything else can be safely ignored.

Proxy

How many active people outside of your household would be picking up food for you? ?

Proxies

− 1 +

[Remove #1](#)

Type of Proxy

Select

Expiration Date

First Name

Ruby

Middle Name (Initial)

Last Name

Rudolph

Suffix

Select

Address

Apartment, Floor, etc.

City

State

Select

ZIP

Phone #

555-555-5555

☐ No phone

Add Proxy

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Food Insecurity

These two questions help assess impact over time by identifying how much food needs are creating stress for the household and whether households have enough food to last the month.

Food Insecurity

Can you please tell me whether the following are often true, sometimes true, or never true for (you or your household):

"Within the past 30 days we worried whether our food would run out before we got money to buy more."

☒ Often true ☐ Sometimes true ☐ Never true

☐ Don't know / Prefer not to answer

"Within the past 30 days the food we bought just didn't last and we didn't have money to get more."

☒ Often true ☐ Sometimes true ☐ Never true

☐ Don't know / Prefer not to answer

Additional Notes

Use this field to record any relevant notes (e.g., requests to update date of birth). Notes are automatically marked as private to your organization. If the information should be visible to others, uncheck the "Mark this note as private" box.

Additional

Additional Notes ?

Need Household members

☒ Mark this note as private (Show only to my organization)

Cancel Save and Continue

Click Save and Continue. This will take you to the next page where services are added.

Primary Services Provided

Record that assistance was provided during the visit by checking the Food Pantry box. Tracking pounds, pieces, dollars, or meals are optional and only needed if you choose to monitor these details locally. For food bank reporting purposes, simply confirm that food was provided.

Primary Service Provided

☒ Food Pantry

Pounds

Pieces

Dollars

Meals

Description

Data Sharing Acknowledgement

Please note, the neighbor is **not** required to share their data with third parties to receive food assistance from pantry partners food. There are currently no plans to share data outside of the Regional Food Bank.

Data Sharing Acknowledgement

To improve our programs and connect you with additional services, we may need to share your personal information with third parties, such as healthcare providers, social service providers, and our other partners, as described in our [Privacy Policy](#). Please indicate below whether you agree to share your personal information with these third party organizations. We will not deny you services based on your answer.

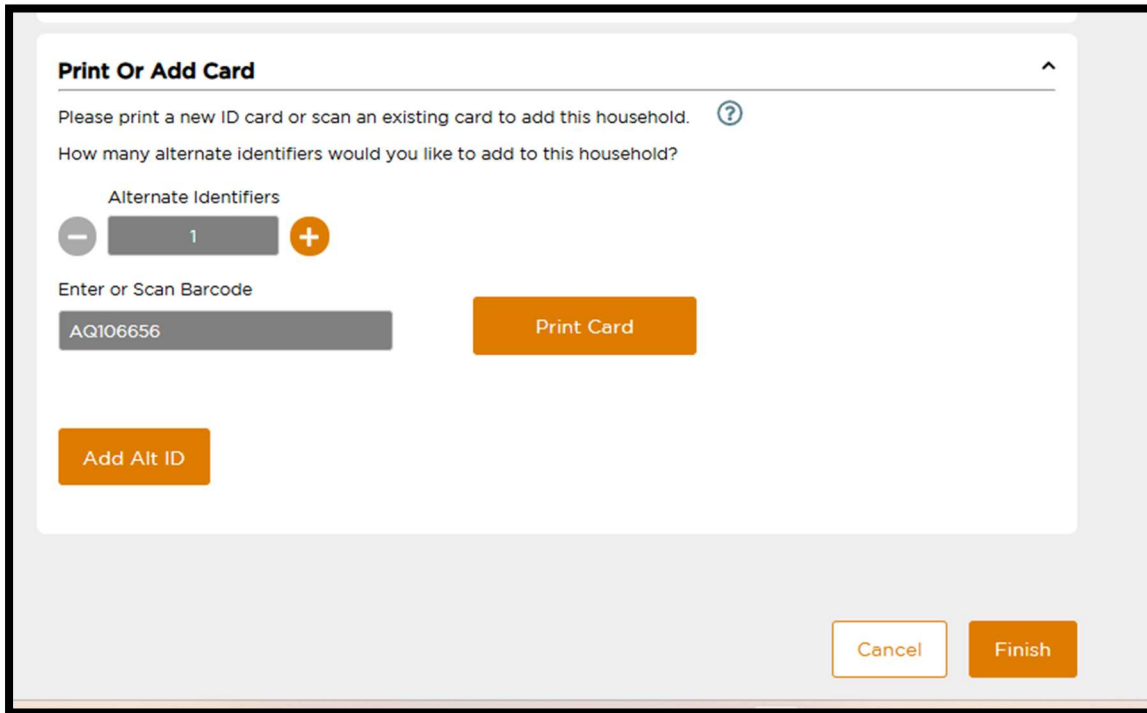
Acknowledgement to share personal information with third parties

☒ I agree to share my personal information with third parties

☐ I do **not** agree to share my personal information with third parties

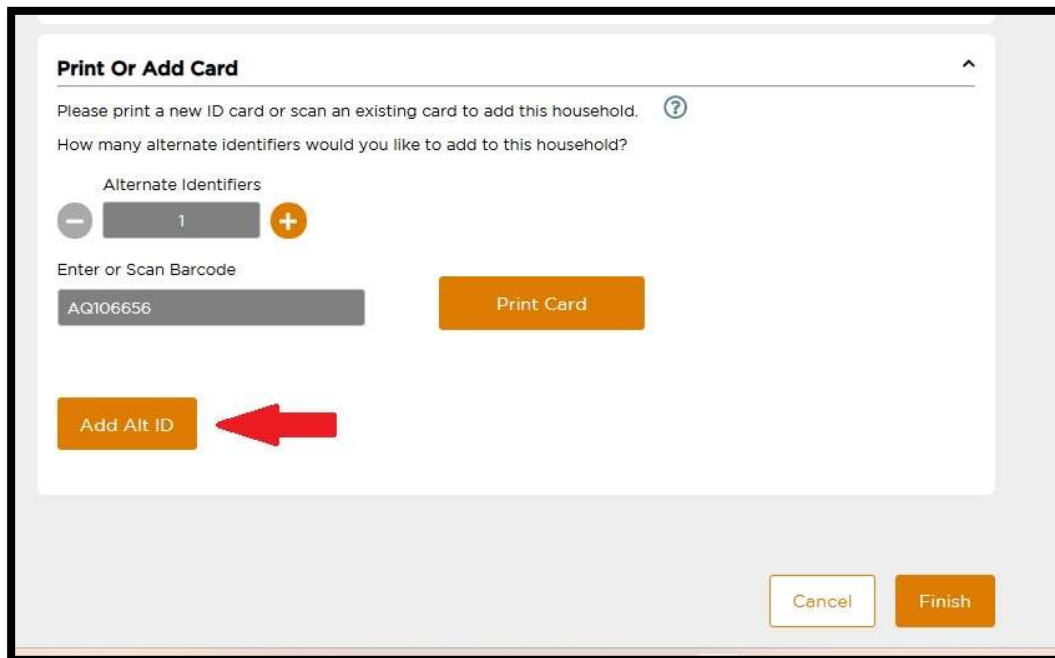
Print or Add Card

The Alt ID is the client number automatically assigned by the system. While you can print ID cards, they are generated individually on standard 8.5" x 11" paper. The most effective way to look up a neighbor is by searching using their Alt ID. Neighbors can access their Alt ID through Feeding America communications (if they have consented to contact) or by having it written down for them.



The screenshot shows a web form titled "Print Or Add Card" with a help icon. The instructions read: "Please print a new ID card or scan an existing card to add this household." and "How many alternate identifiers would you like to add to this household?". Below this is a section for "Alternate Identifiers" with a minus button, a box containing the number "1", and a plus button. Underneath is a label "Enter or Scan Barcode" followed by a text input field containing "AQ106656" and an orange "Print Card" button. At the bottom left of the form is an orange "Add Alt ID" button. At the bottom right of the entire interface are "Cancel" and "Finish" buttons.

If you click add Alt ID, it allows you to move an existing ID into a household.



This screenshot is identical to the one above, but it includes a red arrow pointing directly to the "Add Alt ID" button, highlighting it as the next step in the process.

When you have finished everything, click the orange **Finish** button and the neighbor will have been added and a visit recorded.