

Service Insights: Adding a TEFAP Service

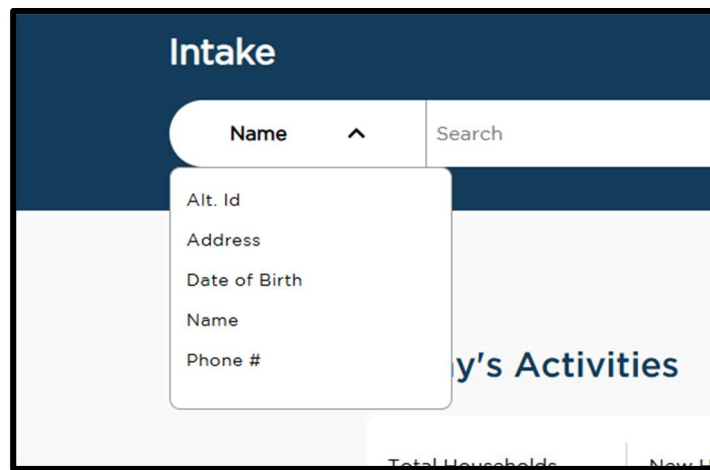
Updated August 2026

Adding A TEFAP Service

This is for neighbors who are already in the system. If you need to add new neighbors, please see [Adding New Households guide](#).

Look up the Neighbor

When you are on the dashboard, you can look up a neighbor by their name, by their Alt ID, their phone,



address or date of birth. Alt ID, Name and Birthdate are the best ways to find someone.

A couple of notes about looking up a neighbor.

- The name order matters:
 - last name then first name will not yield results.
 - just first names will not yield results
- If the name is a very common name like Maria Garcia, it will be too many and the search will not yield results.
- Alt ID will bring up everyone in the household and households associated with that Alt ID not just the head of the household.

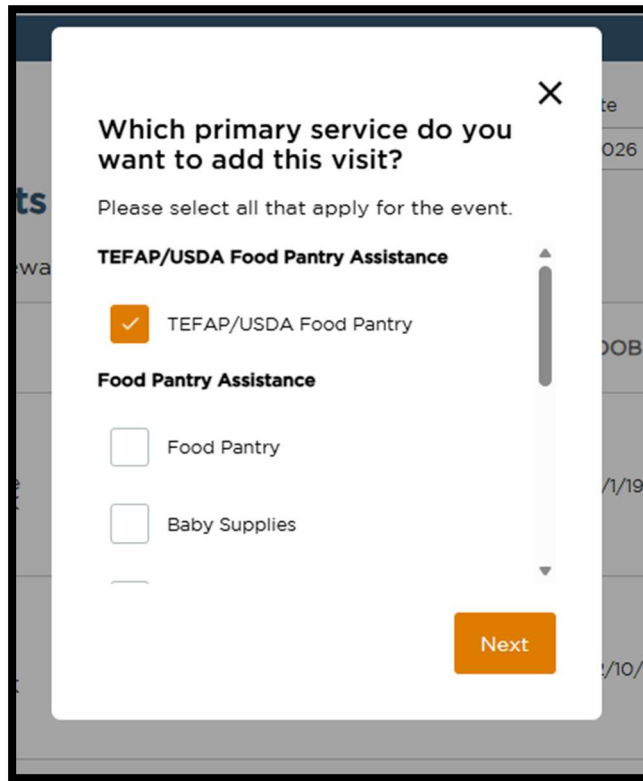
Once you have found the neighbor, you can see their last visit date to ensure they are able to return if you measure that.

To add the Service

Click the Add Visit Orange button.

Name	Active Household Members	Last Visit	Phone	DOB	
— Kevin Rudolph 3355 S Purdue Ave Oklahoma City, OK 73179	4	8/12/2026	555-555-5555	12/16/1977	 Add Visit

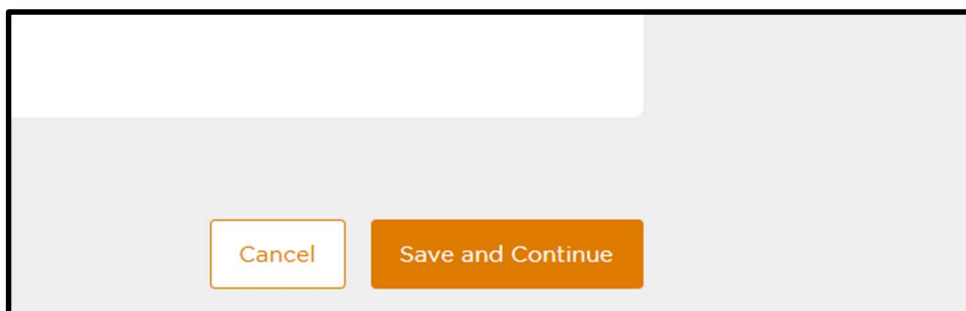
You'll be provided with a pop-up box that asks Which primary service do you want to add for this visit? Choose TEFAP Food Pantry and select Next.



This takes you into their profile. Here you have the option to change any of the demographic and household information needed. Please note you can't change the certification. Once they are certified they are good for the year.

Note:

- *If there nothing that needs to be edited, you can scroll to the bottom and select Save and Continue.*
- *If the neighbor is already certified, you can just Save and Continue. If they need to be certified, you can see the [TEFAP Certification Guide](#).*



If there are no updates to the household profile, continue to scroll down and find the Save and Continue, to the last page, where you can Add any Additional Services (such as pet food or personal care products) by checking the boxes next to them. As you check the box, for example Baby Supplies, additional fields will be displayed where you may track pounds, pieces, dollars and meals. These items are not required by the Regional Food Bank though available in Service Insights if you wish to track these

Add Additional Services to Visit

☒ Baby Supplies

Pounds

Pieces

Dollars

Meals

Description

☐ Clothing

☐ Education Assistance

☐ Financial Assistance

☐ Furniture

☐ Household Goods

When you are complete, scroll to the bottom and click Finish. And you are done!

Cancel

Finish