

# Meal Delivery Software Shopper's Checklist

Courtesy of **MealService Software**

Compiled from experiences with a number of meal delivery organizations offering a wide variety of delivery and walk-in services, here are some questions you may find useful in helping to determine how closely a software package may accommodate your specific method of operation. This set of questions is focused on the meal delivery operation, with only tangential mention of other agency functions. Questions are grouped loosely by category.

## Types of Services and Items

- Specify your methods of delivery
  - Delivered
  - Office Walk-In
  - Congregate sites
- Specify the types of delivered items
  - Hot meals
  - Frozen meals
  - Congregate bulk meals (i.e., steam-table)
  - Congregate individual meals (i.e., lunch bags)
  - Grocery bags
- Itemize the numbers and types of deliveries per day

## Clients

- Do you have the need to identify clients who are members of a household, so that changes to one household member will be reflected in all household members?
- Do you require *Recertification* of your clients?
  - Will you need the ability to set the recertification timeframe?
  - What functionality will you require at the time of recertification?
- What unique demographic elements will you need to track?
  - State- or federally-assigned client numbers
  - Health status or specific disease condition
  - Other unique elements
- Will you need the ability to track affected or non-eligible clients?
  - How many categories will you require? (i.e., client, family, dependent, etc.)
  - Will you need the ability to assign your own category codes to the above groups of clients?

## Addresses

- Do you have a need to deliver to more than one address per client? For example, do you have the need to deliver to an alternate address one day a week if a client is at a clinic?
- Do you have the need to accommodate more than one route per client? For example, a client may pick up meals at your site one day and have those meals delivered the remaining days
- By which jurisdictions will you require aggregate service statistics? For example, will you need the ability to calculate units of service by ward, city, county, state?
- Will you tolerate address errors due to misspellings of city, county or state names or will you require that those fields be populated from a lookup table?
- If you are located outside of the vendor's country, will the software accommodate your specific postal and telephone formats?

## Special Meals

Organizations typically fall into one of two camps regarding special meals:

- Your organization prepares special meals every day for all of the clients with any diet restriction
- Your organization prepares special meals for only those clients who are actually affected by a day's menu. If you are in this camp...
  - How many separate meals will you need to track for identifying which diets are affected? (i.e., lunch and dinner, or only dinner)
  - Do you have the need to identify more than one special meal on a given day?
  - If using a *Special* label, does the label need to specify what makes that meal special?
- How will you need to identify the special meals and to whom they're delivered?
  - Color code
  - Personalized labels
- Will you need to historically track which were the affected diets each day?

## Diet Identification

- Will you need to define the diets to match those your organization is currently using?
- If your organization uses color or other codes to represent a dietary restriction, will you need to continue to use those same codes?
- If your organization uses separate codes for hot and cold items, will you need to assign different codes to each?
- Do you need the ability to track clients' dietary likes and dislikes?
- Will you have the need to accommodate more than one cuisine? That is, do you offer ethnically flavored menus?

## Delivery Labels

- Organizations tend to fall into one of two camps with regard to labeling deliveries
  - Will you require personalized labels for delivery items? If so, will you need to specify the number of labels each item will require? For example, suppose a grocery box requires two labels?
  - Will you require coded labels for delivery items? For example, many organizations don't personally address each item, but rather use a color code to indicate the diet.
- Will you require an addressing or coding system for cold items which is separate from that for hot items?
- Will you need to select labels by a certain specification? For example, by a specific route, by distribution center, by service, by diet?

## Menus

- Will you require the ability to print client-specific menus for delivery with the meals?
- Will you require itemization of kitchen components by
  - Delivered item (i.e., Hot Meal, Cold Bag, etc.)
  - Specific meal component (protein, vegetable, starch, beverage, etc.)
    - If this level of detail is required, will you also require the ability to assign specific component substitutions at the diet-modification level, and then be able to count those substitutions?
- Will you require the ability to plan and store menus by season or other time period?

**Delivery Items and Frequency**

- Do you have the need to schedule deliveries on an intermittent basis... for example, delivering a birthday cake or a case of nutritional supplement?
- Do you offer a service that is delivered on a limited number of days, for example Wednesday through Saturday? Will you need the software to enforce those limited delivery days?
- Do you have the need to customize the items a client will receive?
- Do you have the need to record intermittent or irregular deliveries or walk-ins, such as pantry service or congregate walk-ins?
- Do you need to record bulk deliveries, such as steam table trays to a congregate site?
- Do you need the ability to track capacity by congregate site and limit the number of clients at a site?
- Will you require the ability to create ad-hoc groups of clients? For example, a subset of clients to whom additional items may be delivered once a month.

**Routing**

- Do you require clients to appear on Route Sheets even if they are temporarily suspended or removed from deliveries?
- Will you need the ability to easily move batches of clients from one route to another when reorganizing routes? This may be important when you are defining new routes, or have an agency that is rapidly growing.
- Will you need to easily produce maps with driving directions for each of your routes?
- Do your routes originate from more than one location? That is, do you need to support Distribution Centers?
- Do you require the ability to assign a client to a different route occasionally, perhaps because the client does not get along with a volunteer driver?
- Will you require the ability to assign drivers to routes and track driver statistics?

**Units of Service Statistics**

- What do you consider to be a unit of service?
  - A delivery or walk-in
  - Number of meals
  - Both
- Missed deliveries
  - Will you require that missed deliveries be logged?
  - Will you have a need to categorize the reason for missed deliveries?
- Service suspensions
  - Will you require historical records of service suspensions?
  - Will you require categorization of reasons for service suspensions?

**Reports and Queries**

- Do you require the ability to create your own reports?
- Will you need the ability to email the output from a report?
- Will you need the ability to archive report output?
- Will you require the ability to query the data as needed, using your criteria?
- Will you need the ability to easily create mail merges to selected recipients?

**Funding/Billing**

- Do you have a need to generate donation requests to your clients for a 'pledged' amount per meal?
- Do you need to be able to track pledged amounts for different items? For example, do you ask your clients to pledge different amounts for a meal versus a nutritional supplement?
- Do you have the need to bill
  - Funders? What service statistics is required to produce those bills?
  - Clients?
  - Third parties?
- Will you have the need to track different reimbursement rates for different funding sources?
- Do you have a need for a full accounts receivable module with the ability to generate aged receivables?
- Do you need to be able to automatically shift a client from one funding source to another as of a given date?
- Will you need the ability to issue a credit for a meal to a client for any reason?

**Other Functionality**

Do you have the need to automate other client processes? For example:

- Client intake
  - Will you need the ability to track the status of your intake documents?
  - Will you need the ability to replicate your current intake documents in the client management software? (i.e., eligibility conditions, etc.)
- Nutritional Counseling
  - Will you need to ability to track Counseling sessions?
  - Will you need an analytical tool to quickly identify those clients most at nutritional risk?
  - Will you need the ability to store client health information?
    - Weight at specific points in time
    - Hospitalization and other events
    - Nutritional and health data such as cell counts, BMI, etc. Will those trackable elements need to be customized to match the data you collect?
- Volunteer scheduling
 

Properly implemented, volunteer scheduling requires as much flexibility and sophistication as the core meal delivery software. For example, the ability to store default volunteer days, preferred delivery routes, preferred task, etc. The ability to temporarily suspend a volunteer for one or more days (due to a doctor's appointment or vacation, for example) and easily reassign them to a new temporary day. The ability to log volunteer hours. The ability to track a group of volunteers, such as a church group, etc.
- Will you require remote access from satellite offices or congregate sites?

This list is by no means complete, but it will provide you a base upon which to base your conversations. If you'd like to include MealService Software in your discussions, we'd be happy to discuss how MealService will be able to accommodate your needs.

**MealService Software**

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