

CSFP Electronic Intake in Oasis

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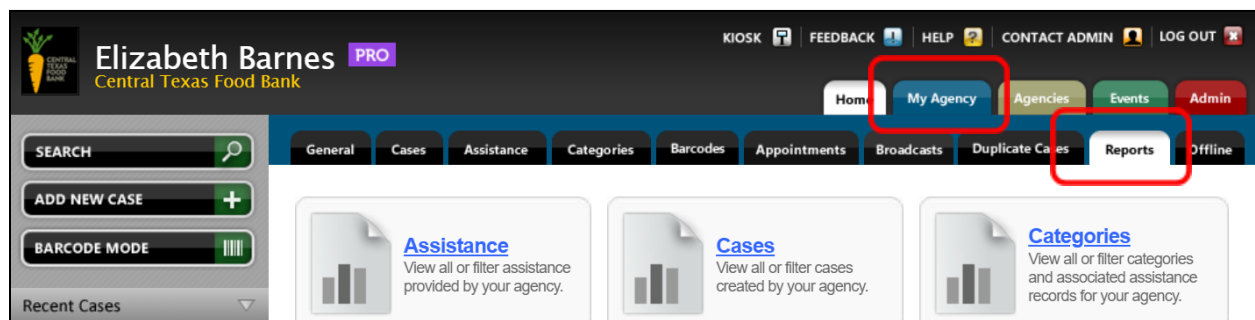
Log in to Oasis

1. Log into Oasis with your account at <https://cafb.oasisinsight.net/>

The CSFP Roster / Client List

Similar to how Link2Feed allowed you to pull a list of CSFP clients with kit issuance, Oasis allows you to pull a list of CSFP clients through a report.

1. Open the “My Agency” tab and then the “Reports” tab. Under “Saved Reports,” select the “CSFP Roster” report.



- Select “EDIT” and “Save & Continue.”

Saved Reports

ADD REPORT +


[CSFP Roster](#)

 EDIT |
  COPY |
  DELETE

CSV — *Ready to download* — To be used for CSFP Roster Creation - change the dates and primary site to run a new report!

Add Report

Name *

Description
 To be used for CSFP Roster creation. Change the date range and CSFP Primary Site before running the report.

Report Type
 Cases

Save & Continue

Cancel

- Choose whether to see cases assisted by your organization (including those imported from Link2Feed) or cases created by your organization. Please note that a client whose “CSFP Primary Site” was recently changed to your organization will not appear on the roster until you have issued them assistance.

Choose Filters for CSFP Roster

☒ Include **Private** Assistance In Totals

Format:
 ☐ List
 ☐ Table
 ☒ CSV
 ☐ Custom

☒ Show Cases **Created** By Your Agency
☐ Show Cases **Assisted** By Your Agency

Filter By **Case Entry Date** (Skip To Include All)

- Choose desired filters. The following are recommended for a roster:
 - “Case Entry Date” or “Date of Assistance”
 - “CSFP Primary Site.”
- Click “Save & Continue.”
- Choose how you would like your roster ordered, or sorted. “Case Name” is recommended for a roster.

The screenshot shows a software interface with a light blue header bar labeled "Order By". Below the header is a dropdown menu. The menu is open, showing several options. The first option is "Case Name" with a downward arrow. Below it are "Entry Date - First to Last", "Entry Date - Last to First", "Case Name" (which is highlighted in blue), and "Head Of Household Name". At the bottom of the dropdown are two checked items: "Case Summary" and "Case Information". To the right of the dropdown menu is a small square icon.

- Choose desired fields. The following are recommended for a roster:
 - Case Information Report Fields > Number, Full name, Phone numbers
 - Case Information Report Fields > Demographics > Proxy Name, Alternative Proxy Name 1, Alternative Proxy Name 2, CSFP Enrollment Status, CSFP Primary Site, Year 1-3 Certification Period Start/End
- Click "Save & Request Updated File."

Once the report is ready for download, you can edit as needed.

1. As participants arrive, check the roster for their name. Once identified on the list, you can check them off the list and log assistance for them after distribution. Alternatively, you can use their Client ID to look them up in Oasis and log assistance live.
2. Alternatively, if it is their first CSFP distribution, you can either have them complete a print CSFP application and add them to Oasis after the distribution or capture their information and generate an application live in Oasis.

Find or Add a Person

3. Even if it is someone's first CSFP distribution, it is possible they are already in Oasis from receiving other services. Search for the first and last name of the person (advanced search is faster than basic search).
4. **If no matches are found**, click "[Click here to create a case](#)" below "No Results Found".
 - a. If no matches are found but you believe they are in the system, try searching first name and the full date of birth, last name and full date of birth, first initial and date of birth, or last initial date of birth. If you can't find them after two or three searches, assume they are not in the system.
5. **If multiple names appear**, check that the date of birth matches. Select the existing record that matches.
 - a. If multiple names are found with the same Date of Birth, feel free to select the case with the most information.

Add/Update Their Information

6. For a new case, fill in all required information listed below. For an existing case, update information as needed and add information where it is blank. You can do so by clicking edit case.

Personal Info for Test Test

[EDIT CASE](#)

Personal Info

Assistance 3

Relationships 2

Notes 1

Documents 0

Alerts 0

Appointments 0

CSFP 4

TEFAP 0

[EDIT CASE](#)

Address: 5409 Pine Pl
Austin, TX 78744

County: Travis

DOB: Dec 7, 1950 - 71 years old

Case #: C819718

Email: elizabethbarnes@utexas.edu

Phone: 972-953-9450 — Main
512-684-2150 — Main

Mailing Address: 1616 W 6th St #100
Austin, TX 78703

Maiden: Not Provided

Nickname: Not Provided

Income - Personal: \$9,600 yr (\$800 mo)

Income - Household: \$9,600 yr (\$800 mo - 22% poverty)

Expenses - Personal: Not Provided

Expenses - Household: Not Provided

Net Income - Personal: \$9,600 yr (\$800 mo)

Net Income - Household: \$9,600 yr (\$800 mo)

Total Living in Household: 3

Agency Last Assistance: Sept 1, 2022

Network Last Assistance: Sept 1, 2022

Other IDs: Not Provided

Details: Other Assistance Received - TEFAP Eligibility Supplemental Nutrition Assistance Program (SNAP)

Gender: Female

Number of Veterans in Household: 0

Household Size: 3

Number of Children (0-17) in Household: 0

Number of Active-Duty Military Members in Household: 0

ROI Consent: Client agrees to share their data with Central Texas Food Bank partners.

Number of Seniors (60+) in Household: 0

Number of College Students in Household: 12

Preferred Language: English

Was there a crisis situation that caused you to need help? (Yes/No)

Do you have anyone allowed to pick up on your behalf? (Yes/No)

Identification Tab

7. Enter Name, Date of Birth, ROI Consent, Street Address (you can add Phone Number and Email, but you cannot require them). Hit the right arrow to go to the next page.

Eligibility and Income Tab

8. TEFAP – Eligibility and Income
 - a. Enter the person's income by selecting "Not Reported" entering the amount, and selecting the interval.

Income Sources

Name Phone Amount Interval

Not Reported - 800.00 Monthly ☐ Delete?

[Add Income Source](#)

9. Skip "Expenses" and "Other Assistance Received" and enter "Household Size"
10. Skip the "Crisis Situation" questions and enter Proxy Name, Address, City, Zip and Phone, if applicable.

Demographics

11. These questions are optional except for Race/Ethnicity, so our neighbors do not have to answer all of them. Still, this is an important part of our Core Data, so please ask all questions on the Demographics tab: Gender, Race/Ethnicity, number of children, seniors, veterans, active-military, and college students, and language.
 - a. For numbers in household for each demographic field, please put zero if none instead of leaving blank if the client states there are zero in the household.
12. Skip Extra Demographics and click the arrow to the right.

CSFP

13. Select CSFP Enrollment Status (currently for new clients, this should be Active with temporary Certification).
14. Enter CSFP Primary Site – this should be your location.
15. Enter Year 1 Certification Period Start (day of distribution) and Year 1 Certification Period End (last day of the distribution month, one year in the future).

Save Changes

16. Click “Add Case” or “Save Changes.”

Create CSFP Form

17. On the case’s page on the right, click the CSFP Tab

CSFP Forms for Test Test

ADD FORM

Show csfp forms for...

☒ Test Grace Test ☒ Living with ☐ Related

Add your first csfp form

Within this tab you can create and view all csfp forms for Test. In addition, you can view csfp forms for anyone related to or living with Test.

Household Size — 2

Personal Info

Assistance 0

Relationships 1

Notes 0

Documents 0

Alerts 0

Appointments 0

CSFP 0

TEFAP 0

18. Click “Add Form”
 - a. All information you already completed will auto-fill to this form.
 - b. Enter your name as “Agent Name *”.
 - c. Scroll down to the bottom of the form. Read the Release of Information (this is different than the prior ROI), and select the appropriate boxes for Participant Rights and responsibilities and Notice of Beneficiary Rights. Note that all participants should receive their notice of Participant Rights and Responsibilities and that box should be checked on every application.
 - d. Skip “Ineligible based on the following” unless the client is ineligible AND they completed a paper form. If they did complete a paper form and are ineligible, select the way in which they are ineligible.
 - e. Ensure the entry date is the same day the client completed their form. If you need to edit the date, select Edit Entry Date/Time and adjust as needed.
 - f. Click “Save and Close”
19. Capture Signature
 - a. Select “Capture Signature” on the Application Summary

Grace San Soucie
Central Texas Food Bank

Wed, Oct 12, 2022 at 10:35 a.m. | [EDIT](#) | [DELETE](#)

No notes

CSFP
for [Test Test](#)

ATTENTION — No signature(s) recorded

[PRINT CSFP APPLICATION](#) [CAPTURE SIGNATURES](#)

CSFP

CSFP Enrollment Status Active-Temporary Certification CSFP Primary Site Grace Baptist Church (CS453) Address 12345 Austin Way City Austin State TX Zip Code 78704 Date of Birth Dec 1, 1950 Monthly Income 2000 Household Size 2	Year 2 Certification Period Start None Year 2 Certification Period End None Year 2 - Agency Representative None Year 3 Certification Period Start None Year 3 Certification Period End None Year 3 - Agency Representative None Authorize Release of Information Yes I have received notice of my Participant Rights and Responsibilities (Form1516). Yes A Written Notice of Beneficiary Rights was made available. No
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- Select "Click here for digital signature"
- If client or proxy is present and application is being entered directly in to Oasis, allow them to sign and hit submit.
- If client submitted a paper form, write "paper" in the signature field.

Primary Applicant / Proxy Signature



Printed Name: Test Grace Test
Date: October 12th 2022

[Re-Sign](#) [Delete Signature](#)

CSFP Check-In

- If you see a banner notifying you that a client is due for their annual CSFP check-in, ask the client if their address has changed.
 - If there has been no change, edit their application to include the date of the check in and one year from that date on their application.
 - If they have had a change of address, they will need to complete a new CSFP application.
- Once the new check-in end date has been added, the banner will change and you can proceed with providing CSFP assistance.

Log Individual Assistance

- Select the green "Go Back" on the top left of the signature page.
- Click the Assistance tab on the right.
- Click "Add Assistance" or "Create the first assistance record"

Only agents from Central Texas Food Bank can view this case and anything added.

Assistance for **Test Test** ADD ASSISTANCE +

Show **all** assistance for... ☒ Test Grace Test ☒ Living with ☐ Related

Create the first assistance record

Keep track of what assistance your organization has provided to this person. Assistance records greatly reduce duplication of services.

Assistance	0
Relationships	1
Notes	0
Documents	0
Alerts	0
Appointments	0
CSFP	1
TEFAP	0

23. On Category, scroll down and select your CSFP assistance category. Make sure the Category, Amount and Unit and Date are correct.
24. Click “Add” at bottom.

Log Multiple Assistance

25. If you used a log sheet to capture attendance instead of entering live into Oasis, you can log multiple assistance records at once for the same distribution based on your log sheet data.
26. Go to “My Agency,” then select the “Assistance,” and then select “Add Multiple Assistance.”

Home My Agency Agencies Events Admin

General Cases **Assistance** Categories Barcodes Appointments Broadcasts Duplicate Cases Reports Offline

This is a list of assistance provided by Central Texas Food Bank since Jan 1, 2022 ADD MULTIPLE ASSISTANCE +

27. Ensure Amount, Unit, Category and Date/Time are correct for your distribution.
28. Enter the Oasis Case ID of a participant and select “Add Case.”
29. Continue until you have entered all Case IDs.
30. Select Add Assistance at the bottom left. This will log assistance for all Case IDs you entered.

Add Multiple Assistance

Amount: 1.00 Unit: Unit

Category: [Testing - DO NOT USE] CSFP Monthly Distrib

Provided By: Central Texas Food Bank

Description:

Edit Date/Time: Oct 12, 2022 at 11:21 a.m.

Edit Funding Source: Unspecified

Visible to: All Agencies

Add Assistance

Cancel

Add this assistance to the following cases:

Enter Case #

Add Case

CS78460 — Test Test

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