CSFP Electronic Intake in Oasis

Contents

Log in to Oasis

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.
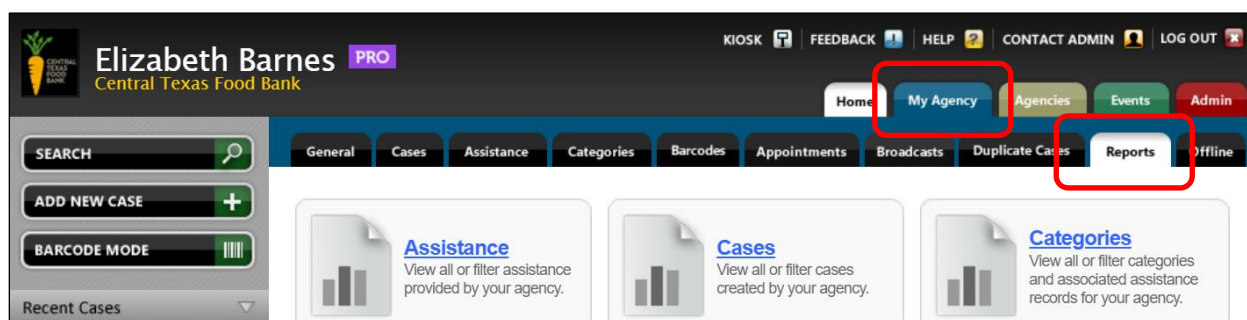
- Select "EDIT" and "Save & Continue."

Saved Reports

ADD REPORT ➕

CSFP Roster

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

✏️ EDIT | 🔘 COPY | ❌ DELETE

Add Report

Name *

CSFP Roster

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

🔘 Show Cases **Created** By Your Agency

⚪ Show Cases **Assisted** By Your Agency

Format: ⚪ List ⚪ Table 🔘 CSV ⚪ Custom

🏷 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.

- 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

1. 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).
2. **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.
3. **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

4. 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**

Address:	5409 Pine Pl Austin, TX 78744	Mailing Address:	1616 W 6th St #100 Austin, TX 78703
County:	Travis	Maiden:	Not Provided
DOB:	Dec 7, 1950 - 71 years old	Nickname:	Not Provided
		Income - Personal:	$9,600 yr ($800 mo)
Case #:	C819718	Income - Household:	$9,600 yr ($800 mo - 22% poverty)
Email:	elizabethbarnes@utexas.edu	Expenses - Personal:	Not Provided
Phone:	972-953-9450 — Main	Expenses - Household:	Not Provided
	512-684-2150 — Main	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) — Household Size: 3 — ROI Consent: Client agrees to share their data with Central Texas Food Bank partners.
Gender: Female — Number of Children (0-17) in Household : 0
Number of Veterans in Household: 0 — Number of Active-Duty Military Members in Household: 0 — 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 — Proxy Name (person allowed to pick up on your

Navigation panel: Personal Info, Assistance 3, Relationships 2, Notes 1, Documents 0, Alerts 0, Appointments 0, CSFP 4, TEFAP 0

Identification Tab

5. 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

6. 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

7. Skip "Expenses" and "Other Assistance Received" and enter "Household Size"
8. Skip the "Crisis Situation" questions and enter Proxy Name, Address, City, Zip and Phone, if applicable.
9. Skip USDA Eligibility Expiration and click the arrow to the right.

Demographics

10. 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.
11. Skip Extra Demographics and click the arrow to the right.

CSFP

12. Select CSFP Enrollment Status (currently for new clients, this should be Active with temporary Certification).
13. Enter CSFP Primary Site – this should be your location.
14. 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

15. Click "Add Case" or "Save Changes."

Create CSFP Form

1. On the case's page on the right, click the CSFP Tab

2. 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"
3. 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 | **Year 2 Certification Period Start**
None |
> | **CSFP Primary Site**
Grace Baptist Church (CS453) | **Year 2 Certification Period End**
None |
> | **Address**
12345 Austin Way | **Year 2 - Agency Representative**
None |
> | **City**
Austin | **Year 3 Certification Period Start**
None |
> | **State**
TX | **Year 3 Certification Period End**
None |
> | **Zip Code**
78704 | **Year 3 - Agency Representative**
None |
> | **Date of Birth**
Dec 1, 1950 | **Authorize Release of Information**
Yes |
> | **Monthly Income**
2000 | **I have received notice of my Participant Rights and Responsibilities (Form1516).**
Yes |
> | **Household Size**
2 | **A Written Notice of Beneficiary Rights was made available.**
No |

b. Select "Click here for digital signature"
c. If client or proxy is present and application is being entered directly in to Oasis, allow them to sign and hit submit.
d. If client submitted a paper form, write "paper" in the signature field.

Primary Applicant / Proxy Signature

> *Paper*   Printed Name: Test Grace Test   ✎ Re-Sign   ✖ Delete Signature
> Date: October 12th 2022

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

Each individual that receives a CSFP box should have their individual assistance logged in Oasis, even if they live in the same house. This is different from our food pantry distributions, where only one food

assistance is logged per household. If two seniors live in a house together and both get a CSFP box, then a CSFP assistance should be logged on each of the clients' Oasis cases.

1. Click the Assistance tab on the right.
2. Click "Add Assistance" or "Create the first assistance record"

3. On Category, scroll down and select your CSFP assistance category. Make sure the Category, Amount and Unit and Date are correct.
4. Click "Add" at bottom.

Log Multiple Assistance

Each individual that receives a CSFP box should have their individual assistance logged in Oasis, even if they live in the same house. This is different from our food pantry distributions, where only one food assistance is logged per household. If two seniors live in a house together and both get a CSFP box, then a CSFP assistance should be logged on each of the clients' Oasis cases.

1. 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.
2. Go to "My Agency," then select the "Assistance," and then select "Add Multiple Assistance."

3. Ensure Amount, Unit, Category and Date/Time are correct for your distribution.
4. Enter the Oasis Case ID of a participant and select "Add Case."
5. Continue until you have entered all Case IDs.
6. Select Add Assistance at the bottom left. This will log assistance for all Case IDs you entered.

CSFP Reporting

Oasis allows you to run a report to see how much assistance your organization distributed in a given time period. After entering all CSFP assistance for the month and before completing the CSFP Monthly Report online, run a report in Oasis to see all the CSFP assistance entered and ensure that you have not missed entering anything.
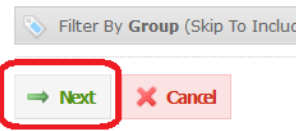
1. Open the "My Agency" tab and then the "Reports" tab. Click the "Assistance" Report type.
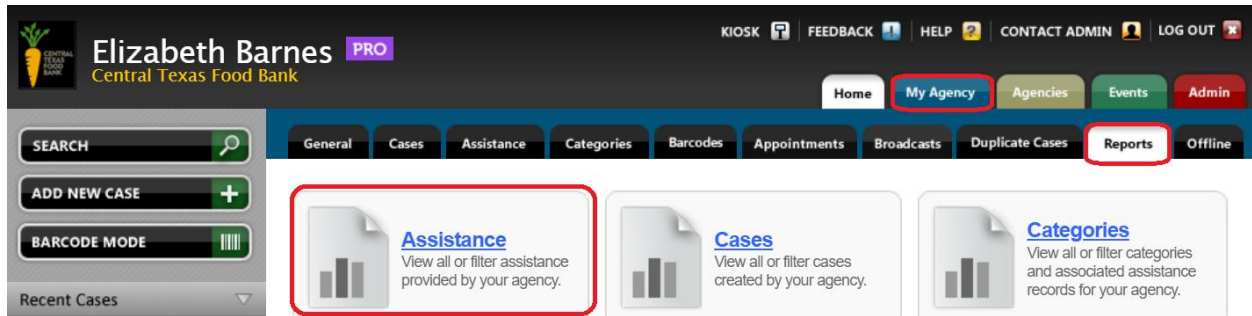
2. Select "Format: Table" to see a summary of visits in Oasis. Select "Format: CSV" to produce a spreadsheet that you can download and open in Excel.
3. Select the Date of Assistance date range to see all assistance entered in that time period. Both start date and end date are required.
4. Select the assistance type you are using (for CSFP, under "Assistance Category" you will find the header "CSFP Assistance" and then can select your specific location under the types of assistance).

5. Go to the bottom and click Next.

Filter By **Group** (Skip To Includ

➡ Next   ✖ Cancel

6. Make sure that Assistance Count is selected (it should be preselected), then go ahead and click View Report at the bottom.

Choose Fields for Report

Order Assistance By
[Oldest to Newest ⌄]

Report Sections To Include   ▣
☑ Report Filters
☑ Assistance Summary
☑ Assistance Record

Assistance Summary Report Fields   ▣
☑ Summary: Assistance amount
☐ Summary: Assistance unit totals
☑ Summary: Assistance count
☐ Summary: Demographic totals (Household Size, Race/Ethnicity, Gender, Disability Status, Military (Current or Veteran))
☑ Summary: Age ranges
☑ Summary: Case count

⬅ Back   ✔ View Report   ✖ Cancel

7. Once your Assistance report loads, look at the Assistance Records value. That is the number of assistance logged in that timeframe and is the number the Central Texas Food Bank is using for monthly reporting.

Report Filters

Include private records:	Yes
Date range:	Jan 01, 2023 to Jan 31, 2023
Category:	CSFP Assistance: CSFP: Cambridge Villas Senior Living

Report Summary

Total Assistance:	$ 0.00
Assistance Records:	30
Children (0 - 17) Assisted:	0
Adult (18 - 64) Assisted:	3
Senior (65+) Assisted:	27
Other (unknown) Assisted:	0
Total Cases Assisted:	**30**
Children (0 - 17) in Assisted Households:	1
Adult (18 - 64) in Assisted Households:	5
Senior (65+) in Assisted Households:	28
Other (unknown) in Assisted Households:	0
Total Households Assisted:	**30 households with a total of 42 members**

8. Note: for CSFP in a given month, the Assistance Records value (30) should match the Total Cases Assisted (30). That means 30 boxes were handed out to 30 clients. If those numbers do not match you may have logged a box twice for a client, or given a specific client two boxes that month. Additionally, since multiple clients in the same household can get CSFP boxes, it may

be that the Total Cases Assisted value is higher than the Total Households Assisted, and that is perfectly normal. If you have any questions on reporting, please reach out to the Central Texas Food Bank at research@centraltexasfoodbank.org.

Glossary

Assistance – Each time an individual client receives a CSFP package, you should record them receiving 1 unit of CSFP assistance. In Link2Feed recording assistance was called recording "visits."

Case – Each individual client in Oasis is a unique case.

Case number – Each individual client in Oasis has a unique case number, or ID number. You can locate this number in the upper right of a client's case page, or profile. Use this number to refer to a specific client in non-secure communications like unencrypted emails.