



# Central Texas Food Bank

## Service Insights: A Guide to Oasis Insight

### Contents

Central Texas Food Bank.....	1
Service Insights: A Guide to Oasis Insight.....	1
1. Joining the Network (First Log-in).....	2
2. Main Dashboard / Home Tab.....	2
3. My Agency Tab .....	2
4. Case Records.....	3
5. Adding a New Case.....	4
6. Completing the TEFAP Certification.....	5
• Paper Intake and Certification + Manual Entry.....	5
• Remote Intake / Kiosk Mode .....	5
• Direct Intake and Certification.....	6
7. Completing the Client Release of Information form.....	7
• How to document ROI in Oasis for all workflows: .....	7
• Workflow 1 Direct Intake into Oasis Insight.....	8
• Workflow 2 Paper Intake and Manual Entry.....	9
8. Editing an Existing Case.....	9
9. Recording Assistance.....	10
10. Other Features/Functions.....	10
For Agency Administrators: .....	10



## 1. Joining the Network (First Log-in)

First, let's join the network. You should have received an email containing: The web address for your Oasis account and a link to create your password. *If you did not receive an email, check to see if it ended up in your spam folder.*

When you click the link to create your password, you are taken to the Enter New Password screen. Just type your password in the fields and click the Set Password button. When you click the Set Password button, you are taken to the login screen. You are now ready to log into Oasis.

Now that you are ready to log in, use your email address and the password you just created. The first time you log in to Oasis you are required to initial the box that confirms your acceptance of the Terms of Service (TOS). The TOS explains your responsibility as a user to maintain the legal and ethical integrity of your network.

Once you've logged in and signed the terms of service, you are ready to start exploring the Oasis service.

## 2. Main Dashboard / Home Tab

The Oasis screen is divided into three sections: Header (dark gray section), Sidebar (light gray section), and the Main Content Area. *Note: The Header and Sidebar are static. The Main Content Area will change depending on which tab you are on.*

- In the right-hand corner of the Header, you'll see tabs. These tabs help you navigate through Oasis. When you click a tab, the Main Content Area changes to reflect the tab you are viewing.
- The Home Tab contains a message box so that the network administrator can put special announcements for all the users to see. Bulletins are for sending network-wide messages and can be created by any user. Each bulletin can receive comments.

## 3. My Agency Tab

This tab has six sub-tabs and is where you keep track of all of your agency's information.

- The General sub-tab contains information about your agency, as well as a listing of all the agents within your agency
- The Cases sub-tab reveals a chronological list of cases that were created by your agency. Each name is also a link that will open that case if you click it.
- The Assistance sub-tab reveals a chronological list of assistance that was provided by your agency.
- The Categories sub-tab shows all the categories of assistance listed under their appropriate section. Global Categories are categories that are available to all agencies, and are managed by the network administrator (CTFB). Agency Categories are available to only your agency, and are managed by your agency's administrator.
- The Reports sub-tab is where you go to run all the reports that pertain to your agency. Also on this sub-tab is a list of all your Custom Reports. You can tailor a report to your specifications and run it



whenever you need to. The last thing on this sub-tab is a list of Recent Reports. You just need to click the report and Oasis will generate a new report reflecting any recent additions to the network database

#### 4. Case Records

You can pull up a client's record by clicking on their name in the Cases sub-tab, or by searching for the client (see Section 6). Each client's case record has five sections: (1) Personal Info, (2) Assistance, (3) Relationships, (4) Notes, (5) Documents, (6) Alerts, (7) Appointments, and (8) TEFAP.

- **Personal Info:** The Personal Info tab keeps track of the basic information for your client. It also keeps track of demographic information. Below the client's basic information is a record of modifications that were to your client's case. Any time an agency changes or adds information for your client, Oasis makes a note of it. At the bottom of the page, you'll see a navigation bar. This bar will allow you scroll through all the modifications.
- **Assistance:** The Assistance tab keeps track of all the assistance provided to your client and those living with your client. Tip: You can see the assistance records for those related to your client by clicking the Related checkbox. To add an Assistance record, click the Add Assistance button (circled) and a window will open where you can record the assistance. (See Section 7)
- **Relationships:** The Relationships Tab shows you everyone who is living with your client, and everyone who is related to your client. To add a new relationship to your client's records, you need to click the Add Relationship button (circled). Note: Oasis Insight reports on total individuals in households pulls from this tab rather than the household size demographic field.
- **Notes:** The Notes Tab keeps track of all the notes for your client and those living with your client. When you click the Add Note button a window will open where you can record a note for your client.
  - To add a note to your client's record, you just need to fill in the description field. The note is private, so only the staff from your agency can view it.
- **Documents:** The Documents Tab is where you can upload documents related to your client. For example, if you filled out the TEFAP intake on paper rather than through the new TEFAP module, you can upload the completed TEFAP intake here.
- **Alerts:** The Alerts Tab keeps track of all the alerts for your client and those living with your client. When you click the Add Alert button a window will open where you can record an alert for your client.



- **Appointments:** You are able to schedule clients for distributions or other types of appointments here through Oasis Insights Pro Client Scheduling feature. We will be providing more trainings and resources for this new feature in the future.

**We will provide more information on TEFAP the TEFAP Tab below in Section 6.**

## 5. Adding a New Case

**To enter a new client, click “Add Case” in the top left corner of the sidebar.**

- The **Add Case** window has 3 sections (for most agencies):
  - Identification
  - Eligibility & Income
  - Demographics
- The **Identification** tab is first. This is where you will record basic name and contact information.
  - You can record multiple phone numbers and identification numbers for a client.
  - **Data Points to Request:**
    - First name\*
    - Last name\*
    - Date of birth\*\*
    - ROI Consent\*\*\*
    - Address / Zip Code\*
    - Phone number
    - E-mail address
  - \*Required for TEFAP Certification
  - \*\*Required for HOPE Eligibility
  - \*\*\*Required for Service Insights Client Release of Information
  - **Visibility:** The default for Service Insights for new clients is “Visible to Network.”
    - While transitioning to Service Insights, if an existing client DOES agree to share data with other agencies, make sure the setting is changed to “Visible to Network”
    - If client DOES NOT agree to share data with other agencies, change the client’s record as “Visible to My Agency”
- The **Eligibility & Income** Tab is where you will collect the household income, needed for TEFAP certification.
  - **Data Points to Collect:**
    - Household Income\* (Interval)
    - Household Income\* (Amount)
    - Other Assistance Received\*
    - Household Size\*
    - Was there a Crisis Situation that caused you to need food?\*
    - If yes, please state the situation\*
    - Proxy Name, Address, City, ZIP\*



- Proxy Phone
  - Alternative Proxy Names
- \*Required for TEFAP Certification

- The **Demographics** tab is where you will collect additional information about your client.
  - **Data Points to Request:**
    - **Government Benefits**
    - **Gender**
    - **Race/Ethnicity**
    - **Number of children** in household
    - **Number of seniors** in household
    - **Number of veterans** in household
    - **Number of active-duty military** in household
    - **Number of college students** in household
    - **Preferred language** – *If “Other,” fill in the client’s preferred language*
  - Other fields in this tab may be used, but is not part of the Service Insights Core Fields

## 6. Completing the TEFAP Certification

There are three workflows for entering client information and completing the TEFAP certification.

- **Paper Intake and Certification + Manual Entry**
  - Use the CTFB TEFAP + Supplemental Intake Form to conduct intake, certify the client for TEFAP/USDA Foods, and request additional core data from the client
  - After the distribution, information can be entered manually into Oasis in any order
  - Completing the TEFAP Form in Oasis manually:
    - Fill out the Case fields (Identification and Eligibility & Income) with the information provided via paper application
    - Open the TEFAP Module and create a TEFAP form.
      - Verify the auto-populated fields are correct
      - Complete “Household is Eligible based on the Following”
      - Enter the name of the person who is certifying the application
      - Change the date of certification in Oasis to match the date on the paper application (Note: It is extremely important for compliance reasons that the certification date in Oasis matches the date on the paper application)
    - To complete the digital signature, enter "Signature on file"
    - **Scan a hard copy of the paper application and upload to the Documents tab in the client’s case record**
- **Remote Intake / Kiosk Mode**
  - Client uses Kiosk Mode to complete their own intake form and enter information, either in advance (via remote intake link) or on-site using a Kiosk Station



- *Note: In Kiosk Mode Settings, need to edit language to explicitly state which information is required for TEFAP certification, and which information is optional for clients to provide*
- When client arrives at the distribution (if pre-registered) or completes intake at the sign-in station, staff will look them up in Oasis and locate their record
- Staff will complete the TEFAP form in Oasis, entering the information provided in Kiosk Mode
- Certify the client for TEFAP, obtain a signature, and proceed with the distribution
  
- **Direct Intake and Certification**  
For new clients:
  - Add a new case in Oasis. Request the following information from the client:
    - First and Last Name (Identification Tab)
    - Address (Identification Tab)
    - Date of Birth – Optional (Identification Tab)
    - Household Income (Eligibility & Income Tab)
    - Household Size (Eligibility & Income Tab)
    - Other Assistance Received (Eligibility & Income Tab)
    - Proxy Info (Eligibility & Income Tab)
    - Collect other demographic fields as needed by organization (making sure client knows additional information is optional to provide, and clients may not be required to provide this information in order to receive assistance).
  - Save the case before entering additional information, and navigate to the TEFAP sub-tab on the right-hand side of the client’s case record.
    - Open the TEFAP Module and create a TEFAP form.
      - Verify the auto-populated fields are correct
      - Complete “Household is Eligible based on the Following”
      - Enter the name of the person who is certifying the application
      - Select “complete the digital signature” to allow client to sign by stylus finger, or mouse.
  
- For existing clients:
  - Search for the client’s record in Oasis and verify that the info in Oasis is correct:
    - First and Last Name (Identification Tab)
    - Address (Identification Tab)
    - Date of Birth – Optional (Identification Tab)
    - Household Income (Eligibility & Income Tab)
    - Household Size (Eligibility & Income Tab)
    - Other Assistance Received (Eligibility & Income Tab)
    - Proxy Info (Eligibility & Income Tab)
    - Verify/collect other demographic fields as needed by organization (making sure client knows additional information is optional to provide, and clients may not be required to provide this information in order to receive assistance).



- Save the case before entering additional information, and navigate to the TEFAP sub-tab on the right-hand side of the client's case record.
  - Open the TEFAP Module and create a TEFAP form.
    - Verify the auto-populated fields are correct
    - Complete "Household is Eligible based on the Following"
    - Enter the name of the person who is certifying the application
    - Select "complete the digital signature" to allow client to sign by stylus finger, or mouse.

## 7. Completing the Client Release of Information form

There are two workflows for completing the Client Release of Information Form.

- How to document ROI in Oasis for all workflows:

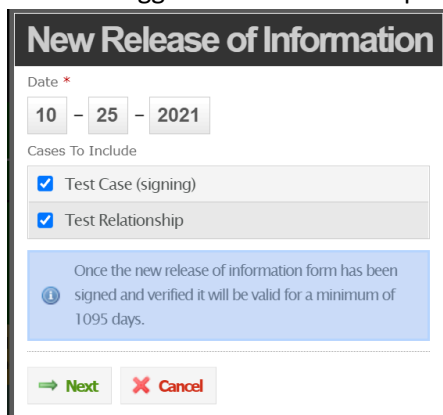
Yellow banner above the Personal Info page will indicate whether a Client ROI needs to be signed. Once it is signed and on file, that banner will turn green. If the Client ROI needs to be signed, go to the Case information and complete the ROI question.

ROI Consent field will be required. See the Client Release of Information Script for more information on how to complete that field. Clients choose between sharing intake information with ALL CTFB network to streamline intake at other sites, or only sharing their data with the current agency and CTFB.

Visible to All Agencies

Make sure the visibility matches their choice. Sharing with all partners means the above option is toggled. If Client wants to keep their information private, switch to “My Agency.”

- Workflow 1 Direct Intake into Oasis Insight
  - Follow instructions above for entry into Oasis.
  - Click the “Create New ROI” or “Renew ROI” button on the yellow banner.
  - Verify date and Case Name. If your agency uses the Relationships tab, every household member logged in the relationships tab will be included in the in the ROI.



- Verify that correct selection is signed, and then click on the “Click Here for Digital Signature” to allow client to sign via mouse, touchpad, or electronic signature pad.

I understand that all information gathered about me is confidential. I have had an opportunity to ask questions about Oasis Insights and to review my basic identifying information and any other information I provide for use with Oasis Insights. This release authorizes my information to be stored in Oasis Insights and shared with CTFB Partners. This release will remain in effect for three years from the date noted by my signature.

*Entiendo que toda la información recopilada sobre mí es confidencial. He tenido la oportunidad de hacer preguntas sobre Oasis Insights y de revisar mi información básica de identificación y cualquier otra información que proporcione para su uso con Oasis Insights. Esta divulgación autoriza que mi información sea almacenada en Oasis Insights y compartida con los socios del CTFB. Esta divulgación permanecerá en vigor durante tres años a partir de la fecha indicada por mi firma.*

*Entiendo las formas cómo se utilizarán mis datos, según lo indicado anteriormente.*

I understand the ways that my data will be used as stated above.

**OR / O**

I understand that all information gathered about me is confidential. I have had an opportunity to ask questions about Oasis Insights and to review my basic identifying information and any other information I provide for use with Oasis Insights. I hereby authorize Oasis Insights to store my information on behalf of CTFB and only share my information with CTFB.

*Entiendo que toda la información recopilada sobre mí es confidencial. He tenido la oportunidad de hacer preguntas sobre Oasis Insights y de revisar mi información básica de identificación y cualquier otra información que proporcione para su uso con Oasis Insights. Por la presente, autorizo a Oasis Insights a almacenar mi información en nombre del CTFB y solo compartir mi información con el CTFB.*

*No deseo que mi información sea compartida con otros socios del CTFB. Entiendo que tendré que completar el proceso de admisión en cada lugar. Esta divulgación permanecerá en vigor durante tres años a partir de la fecha indicada por mi firma.*

*Entiendo las formas cómo se utilizarán mis datos, según lo indicado anteriormente.*

Test Case  
Client Name / Nombre del cliente

[Click Here for Digital Signature](#)

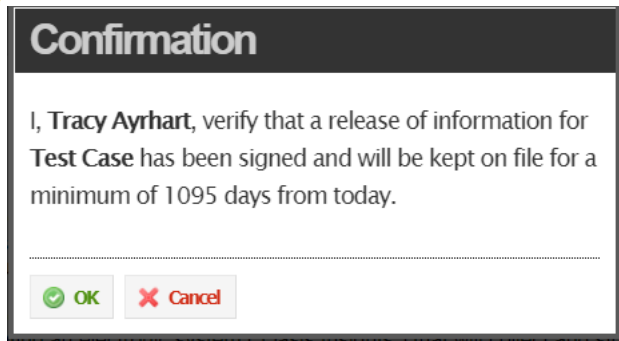
X  
Signature / Firma

10/25/2021  
Date / Fecha

- Click “Verify ROI” at the top of the ROI window and Verify that ROI is signed.







The ROI is now stored in Oasis Insight and the banner should turn green. You can view or print the ROI anytime.

- Workflow 2 Paper Intake and Manual Entry
- Client sign paper version of the ROI.
- After the distribution, complete Oasis entry as outlined above, skipping the electronic signature portion.
- There are two options to store the Client ROI.

Option 1:



- Scan the signed paper ROI and upload using the click on “Upload Signed ROI” option.
- Verify the ROI per instructions above.

Option 2:

- Store the ROI in an accessible place without uploading into Oasis Insight.
- Verify the ROI per instructions above.

Note – for Option 2, the ROI needs to be accessible for compliance purposes. If CTFB ever requests proof of the signed ROI, you will need to be able to pull it up for CTFB review.

## 8. Editing an Existing Case

You can edit an existing client’s information by pulling up their case record. First, you can search for the client to look them up in the system. Click “**Search**” in the top left corner.

- When the search page comes up, type the name of your client and press the Enter key.
- Search matches will be highlighted in yellow. *Tip: If you don’t find your client on the first search, you can shorten the name by either entering their first initial and last name, or first name and last initial. This helps you find people if their name was entered with a different spelling.*
- Once you find the client’s record, click on their name and their Case Record will appear.
- You can edit any of the stored information and click “Save”



## 9. Recording Assistance

Once a new client has been entered into the system, or you have searched for and pulled up an existing client's case record, you can Add Assistance to reflect the services provided during that visit.

- In the case record, click on the Assistance sub-tab on the right hand side of the screen
- Each assistance record keeps track of: the agent who made the record, the time and date of the assistance, the value of the assistance, and the category the assistance was filed under.
- To add an Assistance record, click the Add Assistance button and a window will open where you can record the assistance.
- Once the Add Assistance window opens, you can start entering information.
  - Enter the amount
  - Select the unit of measurement from the drop-down menu (more guidance coming)
  - Select the category from the drop-down menu (more guidance coming)
  - Add notes or give a description, if needed
  - You can change the date or time of the assistance
  - Save the assistance visible to "All Agencies" (default once Service Insights is launched) or "My Agency" (for clients who want to keep their data private)
- Click the Add button when you are finished entering information for the assistance record on this client. If you need to add another record, you can click the Save & Add Another button.

## 10. Other Features/Functions

- Relationships
- Alerts
- Barcode Mode
- Kiosk Mode, Remote Intake
- Client Scheduling
- Client Broadcast
- Offline Reporting/Assistance

For Agency Administrators:

- 1) **Reporting** (Cases, Assistance, TEFAP, Demographics)