



**OasisInsight**<sup>™</sup>

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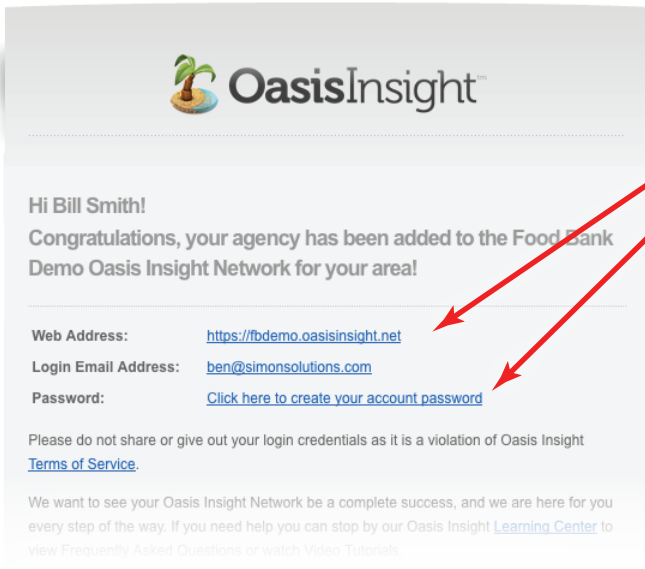
## User Guide

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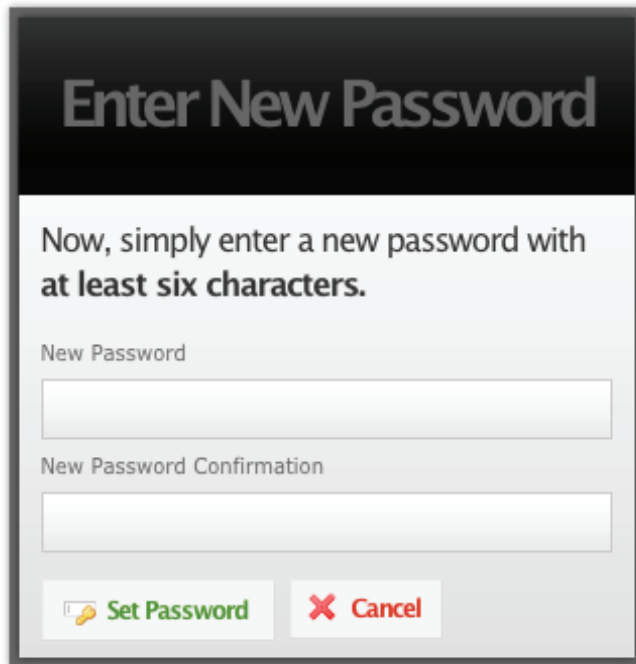
Welcome to the user guide for Oasis Insight! We hope this guide will help you get comfortable with the Oasis Insight service (Oasis). We encourage you to have Oasis open on your computer while you look through this guide, so you can “click around” and get familiar with everything. Let’s get started!



First off, let’s join the network. You should have received an email containing:

- The web address for your Oasis
- A link to create your password

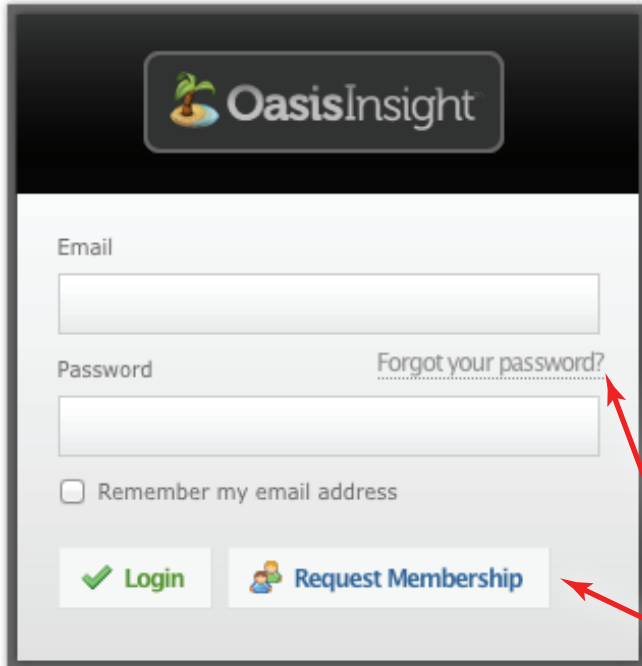
**Tip:** If you did not receive an email, check to see if it ended up in your spam folder.



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.



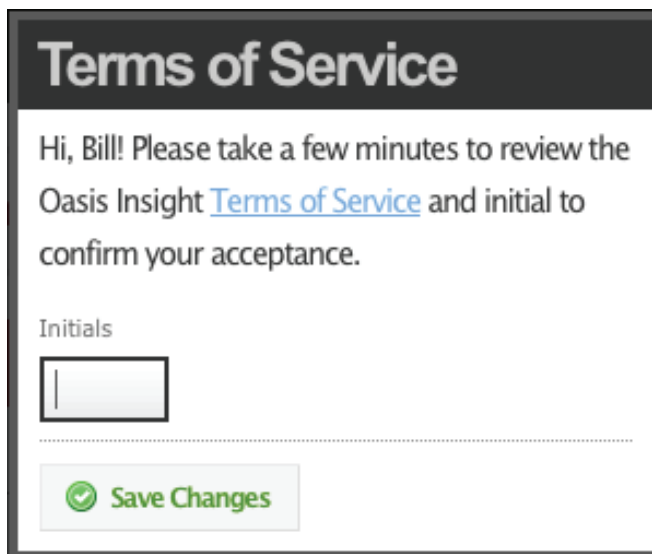
Now that you are ready to log in, use your email address and the password you just created.

**Tip:** Here are some things that will cause an unsuccessful login:

- CAPS lock key is on. The login fields are case sensitive.
- A space at the front or end of either your email address or password.
- An inaccurate setting of the time/date/year on your computer.

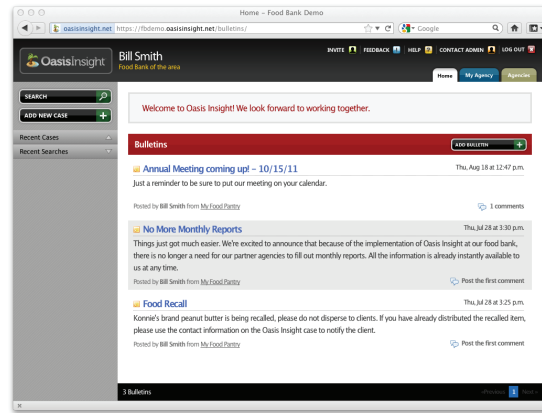
Click here if you ever forget your password.

The Request Membership button is for organizations that do not have access to your Oasis network. They can click this button and go through a process to ask the administrator of your Oasis for permission to join your network.

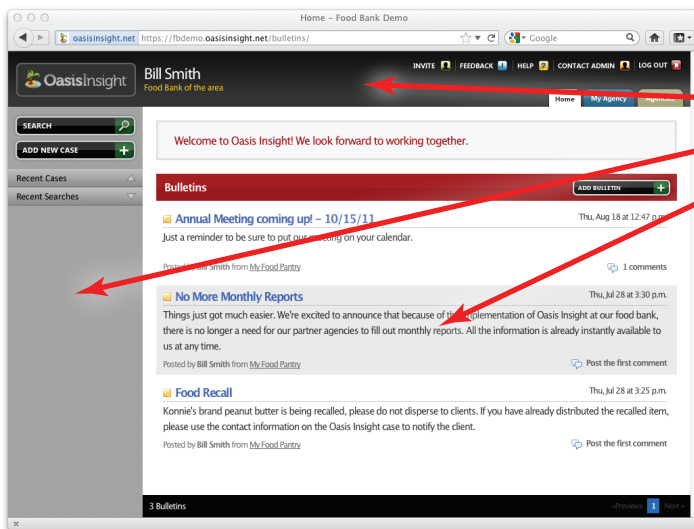


The first time you log in to Oasis you are required to initial the box that confirms your acceptance of the Terms of Service (TOS).

The TOS explains your responsibility as a user to maintain the legal and ethical integrity of your network.



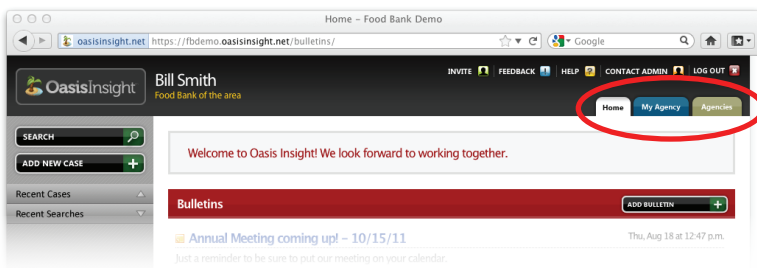
Once you've logged in and signed the terms of service, you are ready to start exploring the Oasis service. Oasis is designed to be extremely user friendly, and we hope you actually enjoy using the system. If you have questions or problems along the way please don't hesitate to let us know and we will be glad to help in any way we can.



The Oasis screen is divided into three sections:

- Header (dark gray section)
- Sidebar (light gray section)
- Main Content Area

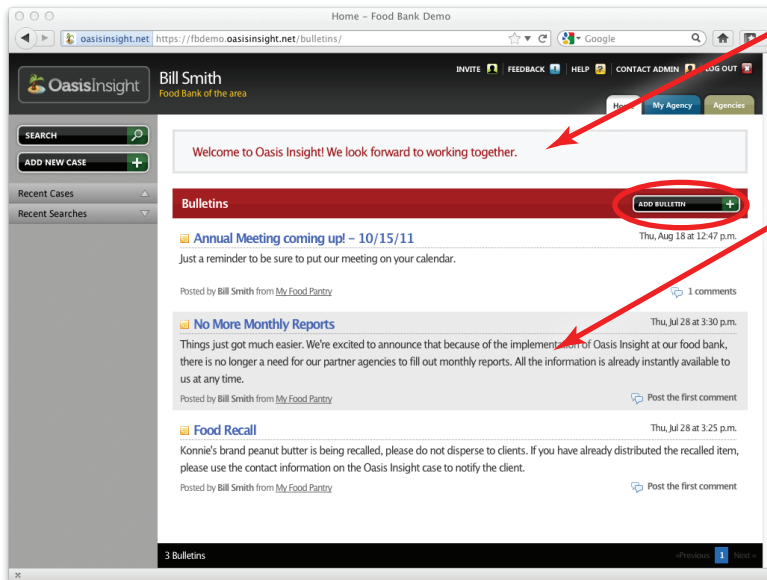
**Note:** The Header and Sidebar are static. The Main Content Area will change depending on which tab you are on.



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.

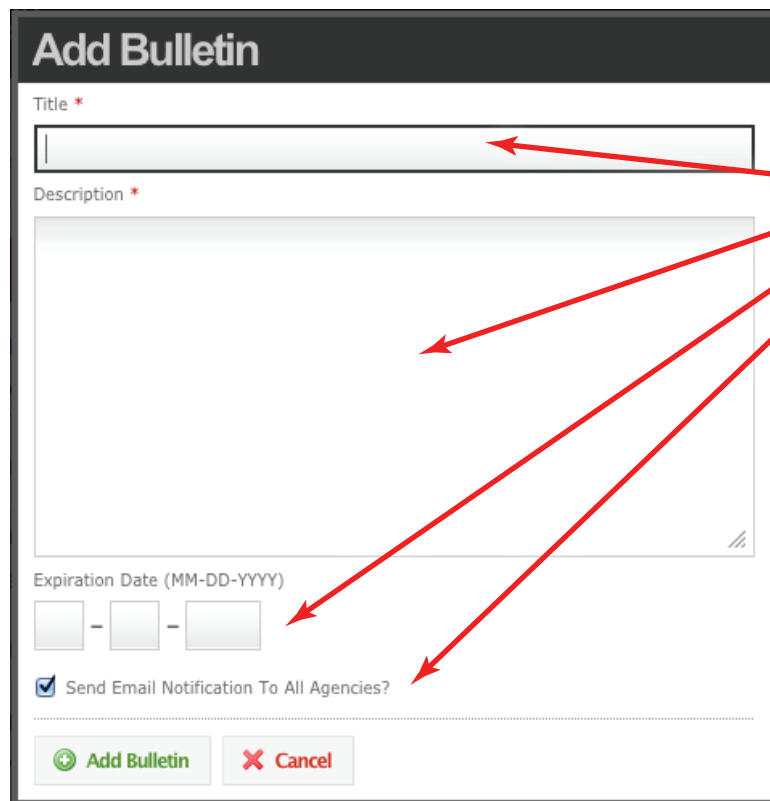
The **Home Tab** is the first thing you see when you log in to Oasis.



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.

It's easy to add a bulletin, you just click the Add Bulletin button (shown in the circle).



When you click the Add Bulletin button, a window will open so you can enter your information:

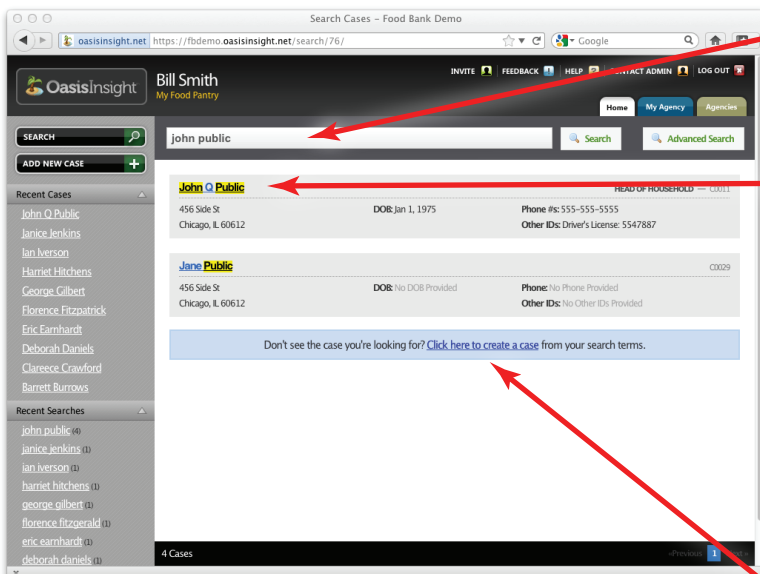
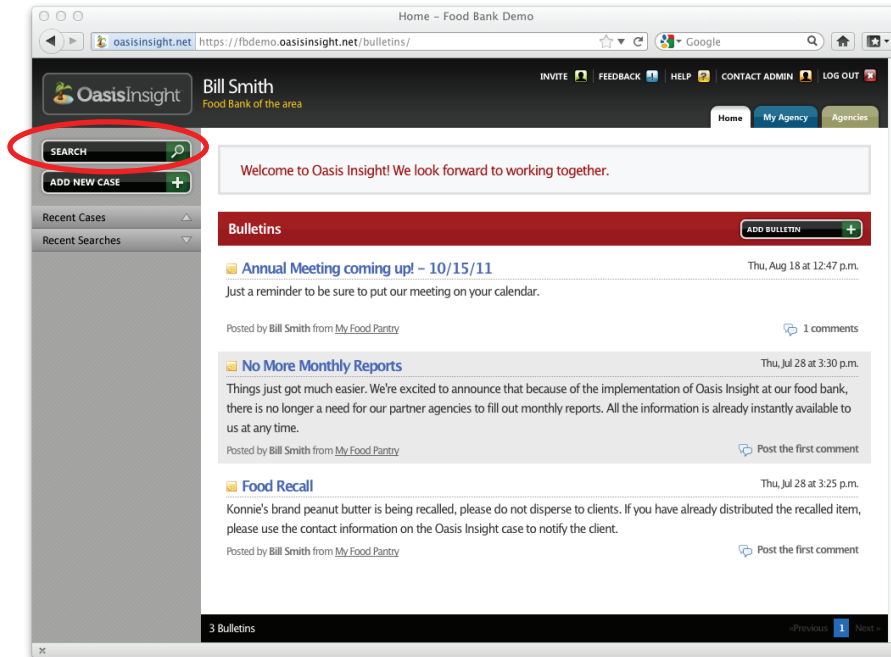
- The title of your bulletin
- A description for your bulletin
- Expiration date (optional)
- Send an automatic email notification to all the agencies in our network (optional)

**Tip:** Any time you see a red asterisk (\*) it means that the field is required, and must be filled in before proceeding.

Once you click the Add Bulletin button, the bulletin will appear on the Home Tab for everyone to see. If you checked the Send Email Notification To All Agencies button, the emails will be sent.

Agents in your community can then add comments and responses to your bulletins.

When a client comes to you for assistance, it's always a good idea to check the system to see if they have already been entered. Start by clicking the Search button.



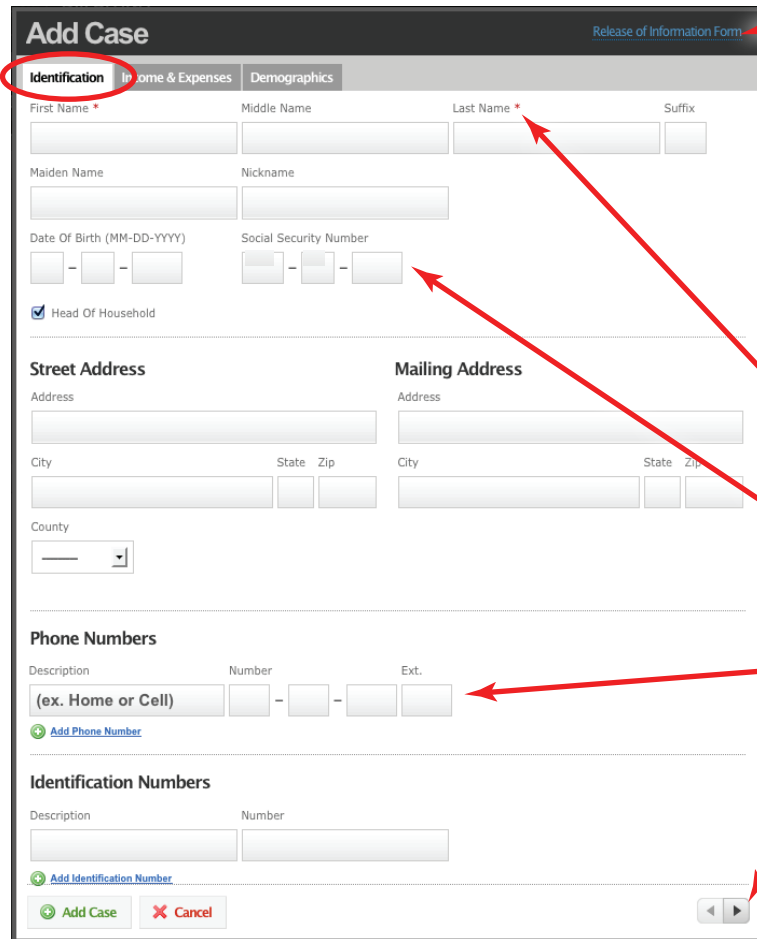
When the search page comes up, type the name of your client and press the Enter key.

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 previously entered with a different spelling.

If you can't find the client in the system, you can click the link to begin adding a new case.

The **Add Case window** has three sections: Identification, Income & Expenses, and Demographics. The Identification tab (shown in the circle) is first.



**Add Case** Release of Information Form

**Identification** | Income & Expenses | Demographics

First Name \* Middle Name Last Name \* Suffix

Maiden Name Nickname

Date Of Birth (MM-DD-YYYY) Social Security Number

Head Of Household

**Street Address** **Mailing Address**

Address Address

City State Zip City State Zip

County

**Phone Numbers**

Description Number Ext.

(ex. Home or Cell)

[Add Phone Number](#)

**Identification Numbers**

Description Number

[Add Identification Number](#)

[Add Case](#) [Cancel](#) ◀ ▶

All clients must sign a Release of Information form (ROI) before they can be saved in the system. Clicking the link will open a copy of the ROI so you can print it, fill it out, and have your client sign.

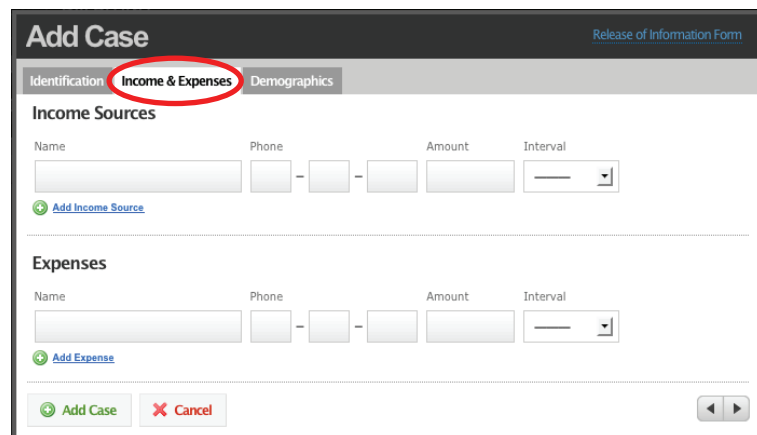
**Tip:** If you type in your client's information before you click the ROI link, the form will be automatically pre-filled.

Remember, red asterisks show the information required to add a new case.

Entering a Social Security Number is optional. To use a partial number, you simply leave the unused spaces blank.

Multiple phone numbers and multiple identification numbers can be recorded for your client.

These arrows allow you to switch to the next section of the Add Case window.



**Add Case** Release of Information Form

Identification | **Income & Expenses** | Demographics

**Income Sources**

Name Phone Amount Interval

[Add Income Source](#)

**Expenses**

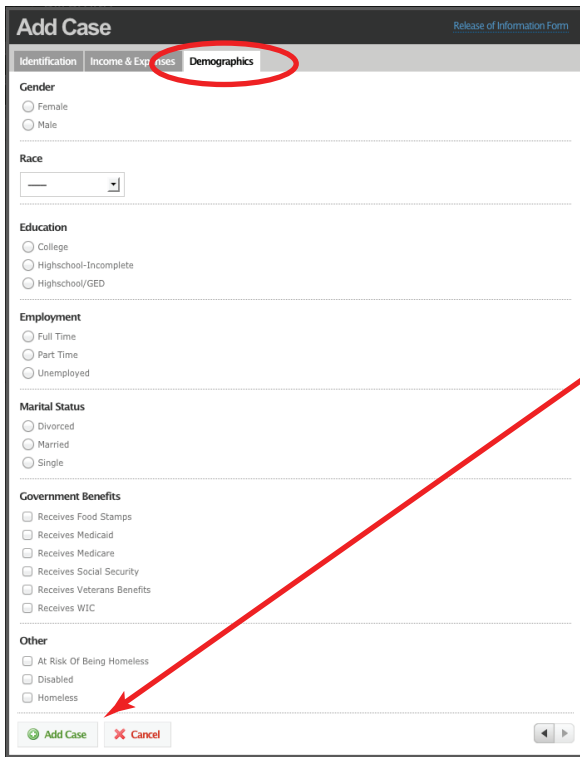
Name Phone Amount Interval

[Add Expense](#)

[Add Case](#) [Cancel](#) ◀ ▶

The next section is the Income & Expenses tab. Oasis will calculate and display the yearly income, as well as the monthly income, on the Personal Info tab. You will also notice that the Household income is displayed on that tab as well.



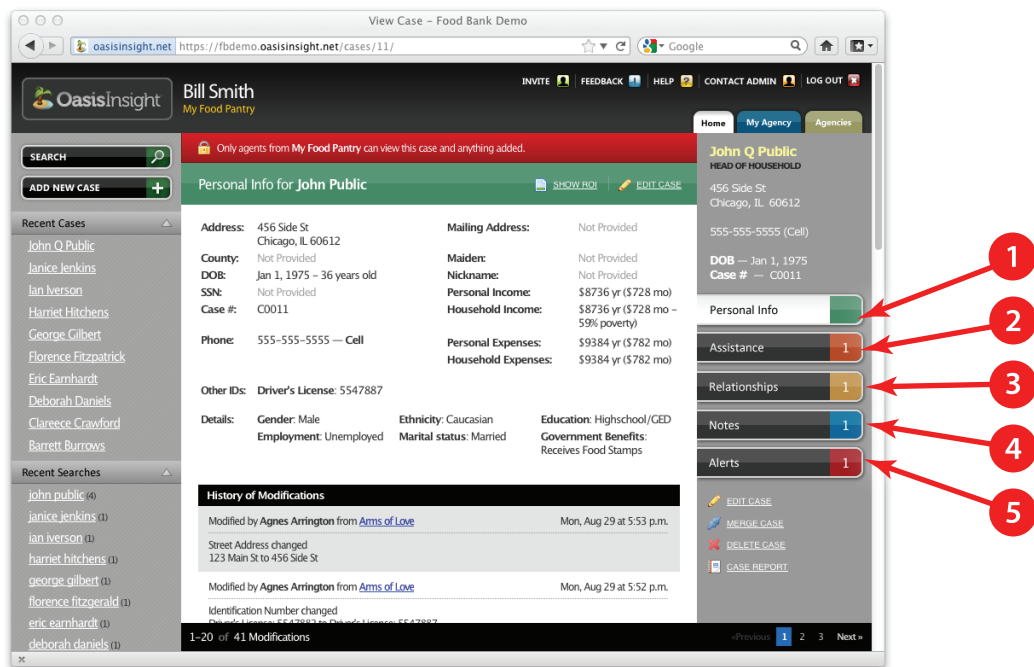


The Demographics tab can be customized by the network administrator to allow for gathering an almost unlimited amount of information about your clients.

Any of the demographics can be marked "Required", making it impossible to enter a client's information unless the field is filled in.

When you click the Add Case button the case opens on the Personal Info tab.

Each case in Oasis has five sections: (1) Personal Info, (2) Assistance, (3) Relationships, (4) Notes, and (5) Alerts. On the next page, we'll start by zooming in and taking a look at the Personal Info tab.



View Case - Food Bank Demo

oasisinsight.net https://fbdemo.oasisinsight.net/cases/11/

Bill Smith  
My Food Pantry

INVITE FEEDBACK HELP CONTACT ADMIN LOG OUT

Home My Agency Agencies

SEARCH

ADD NEW CASE

Recent Cases

- John Q Public
- Janice Jenkins
- Ian Iverson
- Harriet Hitchens
- George Gilbert
- Florence Fitzpatrick
- Eric Earnhardt
- Deborah Daniels
- Clarence Crawford
- Barrett Burrows

Recent Searches

- john public (4)
- janice jenkins (1)
- ian iverson (1)
- harriet hitchens (1)
- george gilbert (1)
- florence fitzgerald (1)
- eric earnhardt (1)
- deborah daniels (1)

Only agents from My Food Pantry can view this case and anything added.

Personal Info for John Public

SHOW ROI EDIT CASE

John Q Public  
HEAD OF HOUSEHOLD  
456 Side St  
Chicago, IL 60612  
555-555-5555 (Cell)  
DOB - Jan 1, 1975  
Case # - C0011

Address: 456 Side St  
Chicago, IL 60612

County: Not Provided

DOB: Jan 1, 1975 - 36 years old

SSN: Not Provided

Case #: C0011

Phone: 555-555-5555 - Cell

Mailing Address: Not Provided

Maiden: Not Provided

Nickname: Not Provided

Personal Income: \$8736 yr (\$728 mo)

Household Income: \$8736 yr (\$728 mo - 59% poverty)

Personal Expenses: \$9384 yr (\$782 mo)

Household Expenses: \$9384 yr (\$782 mo)

Other IDs: Driver's License: 5547887

Details: Gender: Male Ethnicity: Caucasian Education: Highschool/GED  
Employment: Unemployed Marital status: Married Government Benefits: Receives Food Stamps

History of Modifications

- Modified by Agnes Arrington from Arms of Love Mon, Aug 29 at 5:53 p.m.  
Street Address changed  
123 Main St to 456 Side St
- Modified by Agnes Arrington from Arms of Love Mon, Aug 29 at 5:52 p.m.  
Identification Number changed  
C0011 to C0011

1-20 of 41 Modifications

Personal Info 1

Assistance 1

Relationships 1

Notes 1

Alerts 1

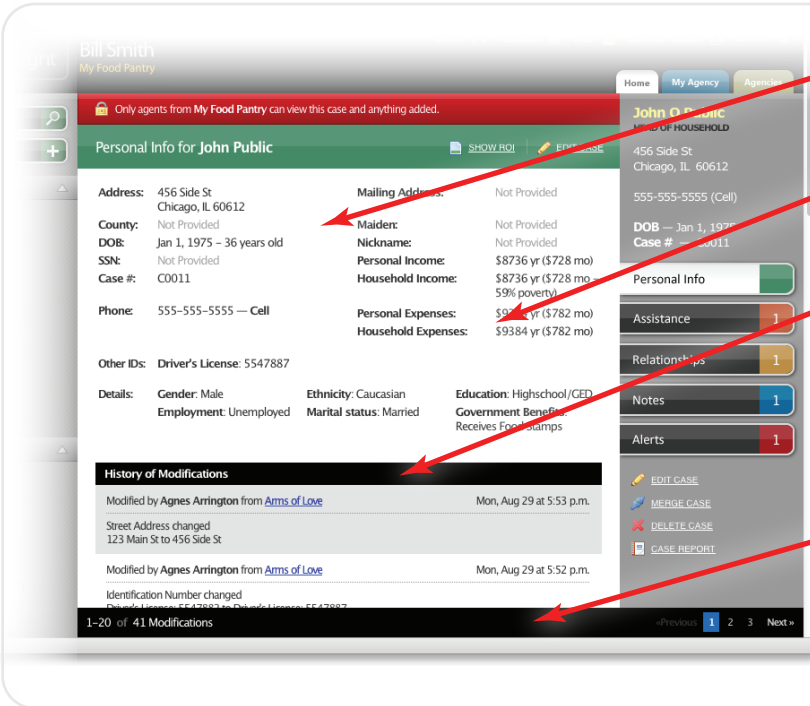
EDIT CASE

MERGE CASE

DELETE CASE

CASE REPORT

1 2 3 Next

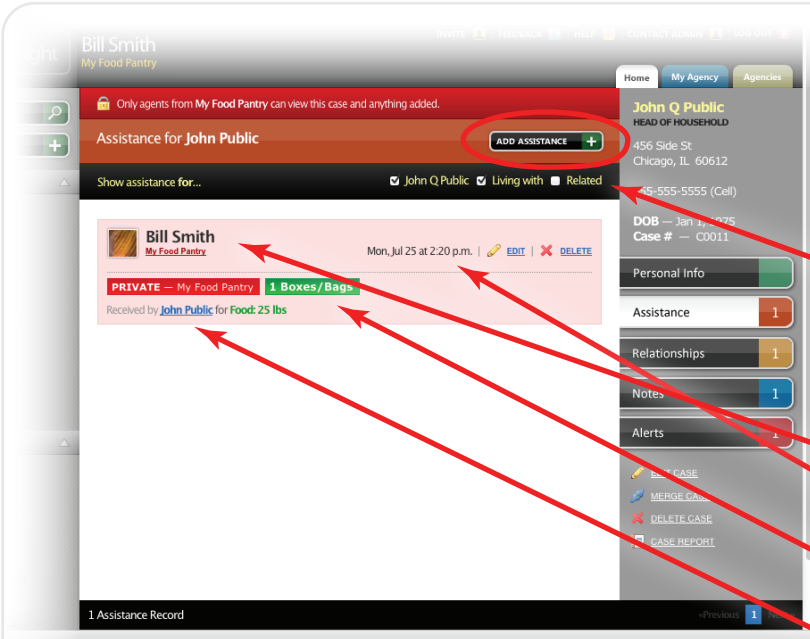


The **Personal Info** tab keeps track of the basic information for your client.

It also keeps track of demographic information.

Below the client's basic information is a record of modifications that have been made 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.



The **Assistance** tab keeps track of all the assistance given 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.

Each assistance record keeps track of:

- The agent who made the record
- The time and date the record was made
- The value of the assistance, with a description
- The client who received the assistance, and the category the assistance was filed under

To add an Assistance record, click the Add Assistance button (circled) and a window will open where you can record the assistance. (See next page.)

**Add Assistance**

Be sure to verify this is the correct case for **John Public** using a form of identification.

Amount \*  Unit

Category  [Manage Categories](#)

Description

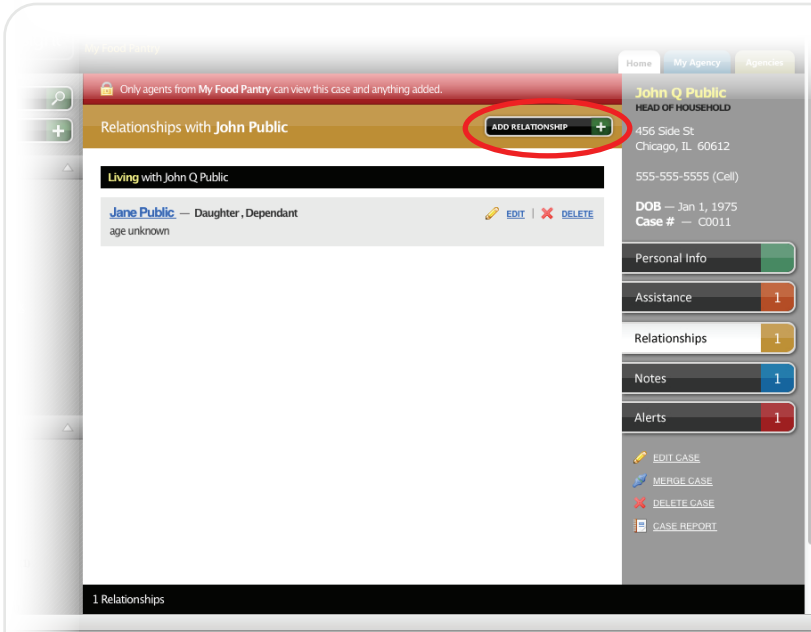
[Edit Date/Time](#) — Oct 15, 2010 at 2:35 p.m.  
[Edit Funding Source](#) — Unspecified

This case and anything added is only visible to My Food Pantry

Once the Add Assistance window opens, you can start entering information.

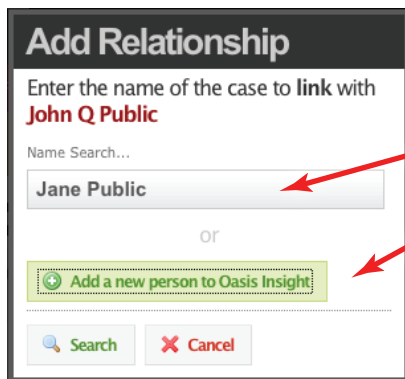
- Enter the amount
- Select the unit of measurement from the drop-down menu
- Select the category from the drop-down menu
- Give a description, if needed
- If you need to change the date for your assistance, click this link.
- You can make the record visible to **only** your agency by clicking this arrow and selecting "My Agency".

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.



The **Relationships Tab** shows you every one 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).



When you click the Add Relationship button, a window opens, giving you two options:

- You can search Oasis to see if the person who is related to your client already exists in the system
- You can add a new person to the Oasis system. *(Please note, it is always a good idea to do a search to see if the person is already in the system.)*

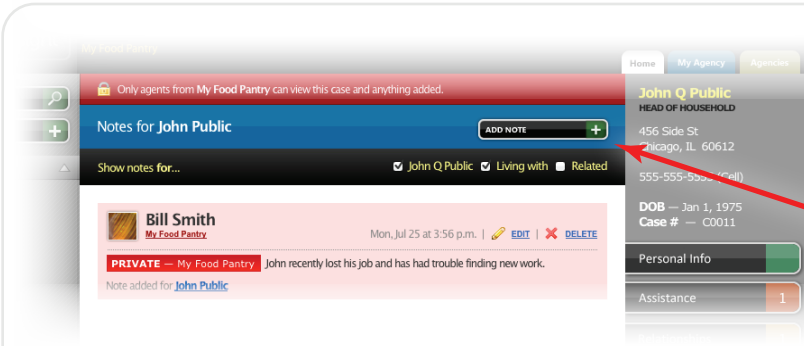


Once you have added the relationship to Oasis, a window will open for you to define to the relationship.

You can mark whether or not the relationship is a dependant.

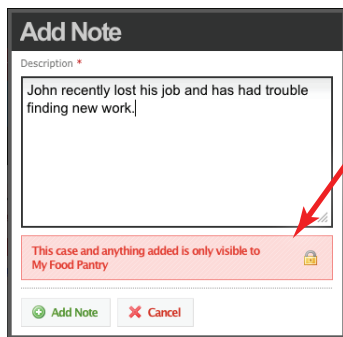
You can define whether or not the relationship lives with your client.

When you click the Add Relationship button the relationship is recorded.



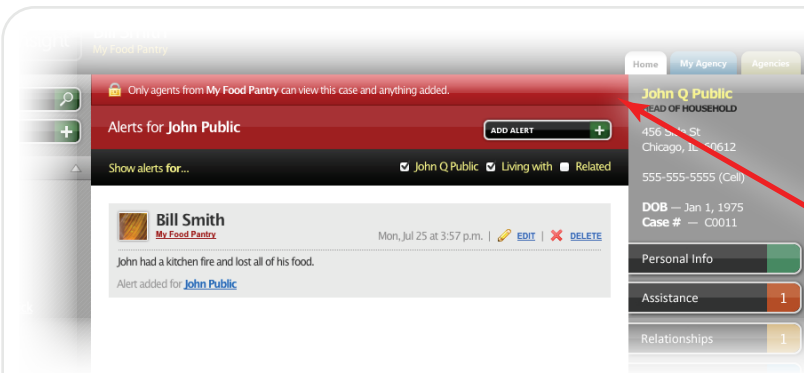
The **Notes Tab** keeps track of all the notes for your client and those living with your client.

When you click the Add Note button a window will open where you can record a note for your client.



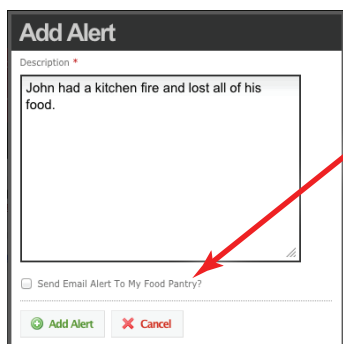
To add a note to your client's record, you just need to fill in the description field.

The note is private, so that only the agents in your agency can view it.



The **Alerts Tab** keeps track of all the alerts for your client and those living with your client.

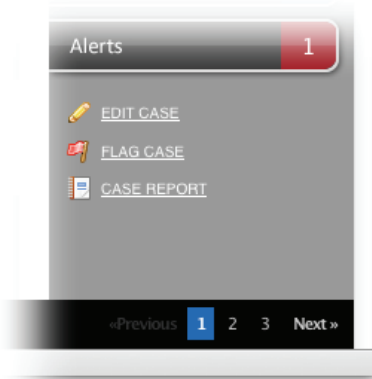
When you click the Add Alert button a window will open where you can record an alert for your client.



To add an alert to your client's record, you need to fill in the description field.

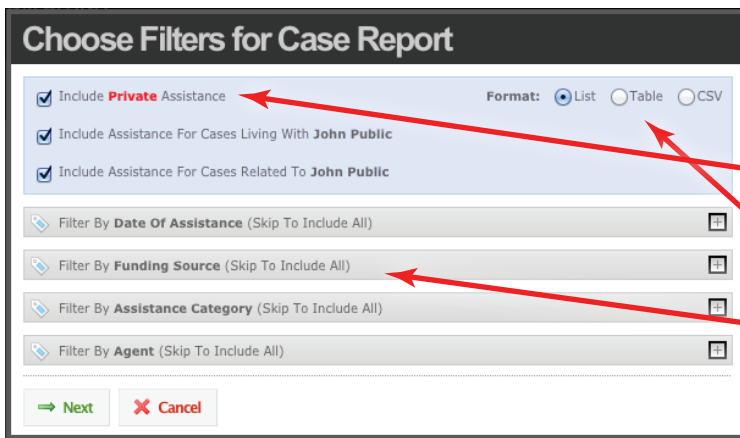
You have the option to send an email alert to all the agents in your agency.

When you click the Add Alert button, the alert is saved. If you checked the Send Email Alert To [your agency] box, an email will be sent to every agent in your agency.



There are three links below the Alerts Tab.

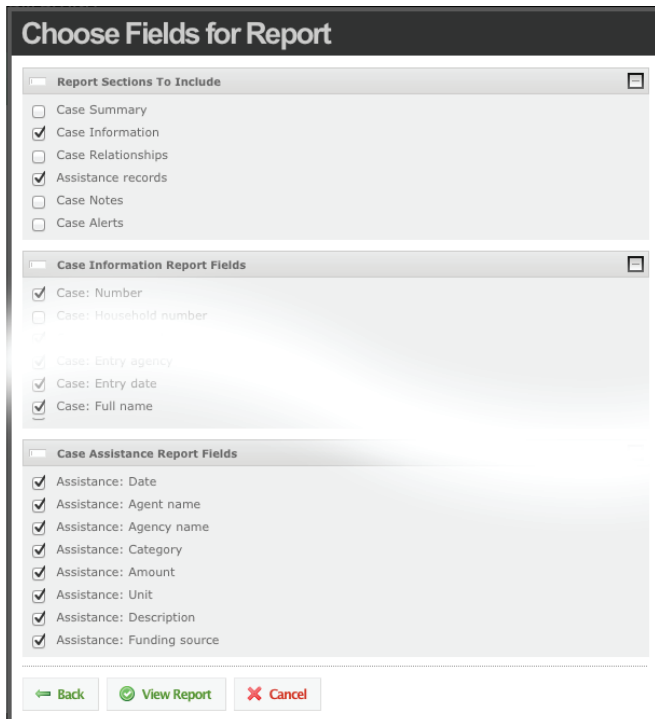
- The Edit Case link will open your client's personal information section to allow you to change or add information.
- The Flag Case link will open a window that will let you send a message to the administrator of your network.
- The Case Report link opens a window so you can run a report on this specific case. (See below.)



When you click on the Case Report link, a window opens where you can choose the format and filters for your report.

- First, check the boxes to include what you need in this report.
- Next, select the export format from the options listed. (See note below.)
- Then, click the filters you want to customize for this report.

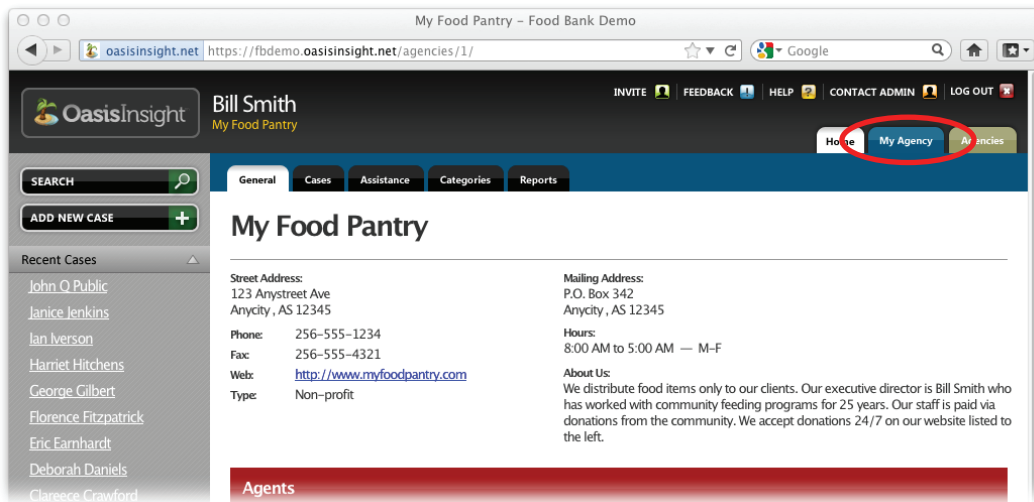
Click the Next button for the next window.



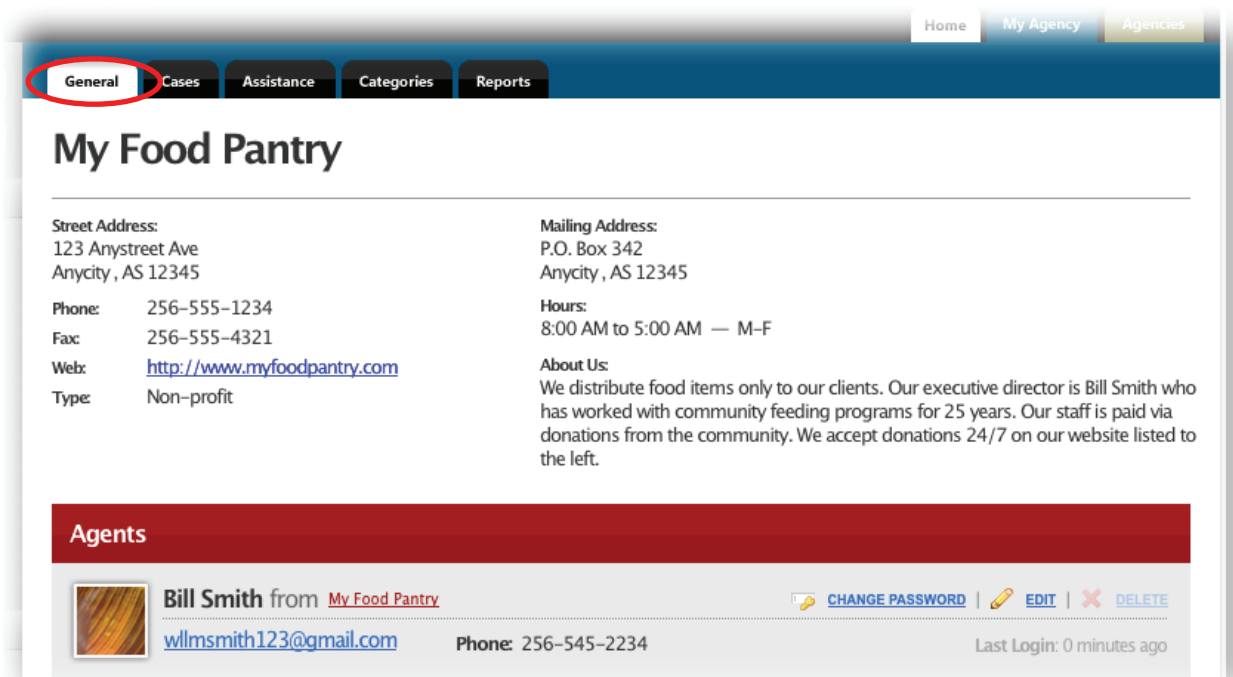
Finally, select the fields you want to be included in your report and click the View Report button.

**Note:** If you selected the List export format, your report will open in a new window to be printed from your browser. If you selected the Table export format, your report will open in a new window in a table format. If you selected the CSV export format, you will receive an email when your report is ready (within 15 minutes). Your report will be in a file that you can open with any spreadsheet program like Open Office or Excel.

Now let's take a look at the **My Agency Tab**. This tab has six sub-tabs, it's where you keep track of all of your agency's information. We'll zoom in and go over each sub-tab. The General sub-tab is first.



The General sub-tab contains information about your agency, as well as a listing of all the agents within your agency.

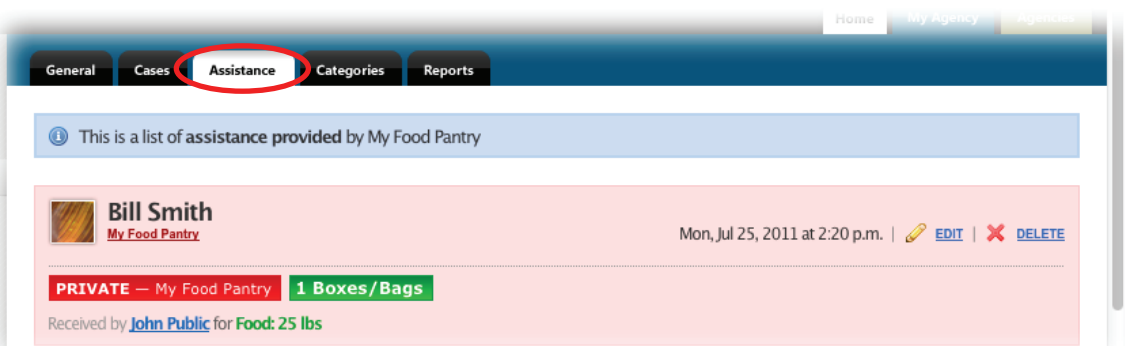


Network and Agency Administrators can add agents and edit agent details here. Also, this is place to disable an agent's login. An agent cannot be deleted from the system once they have entered information into Oasis.

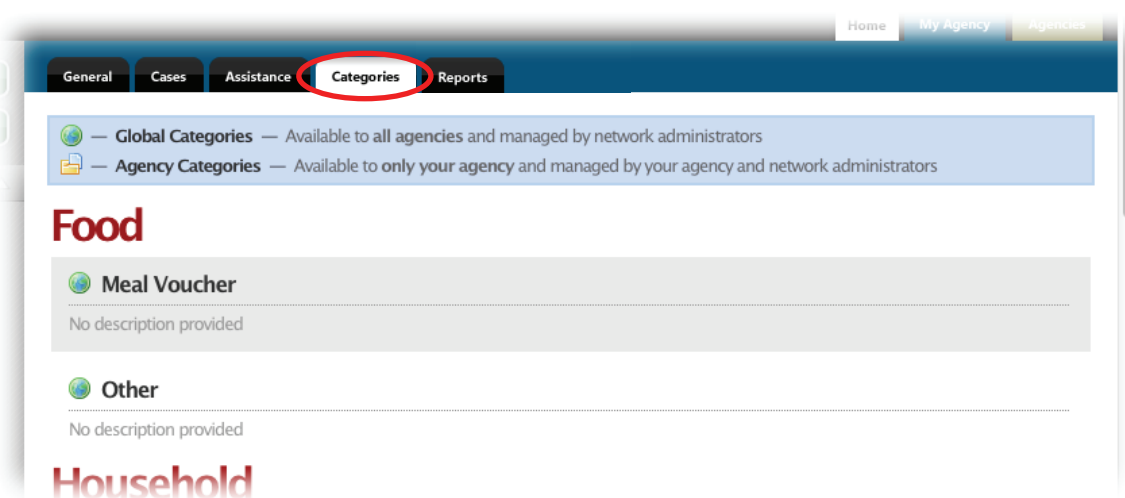
The Cases sub-tab reveals a chronological list of cases that have been created by your agency. Each name is also a link that will open that case if you click it.



The Assistance sub-tab reveals a chronological list of assistance that has been given 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. Agency Categories are available to only your agency, and are managed by your agency's administrator.

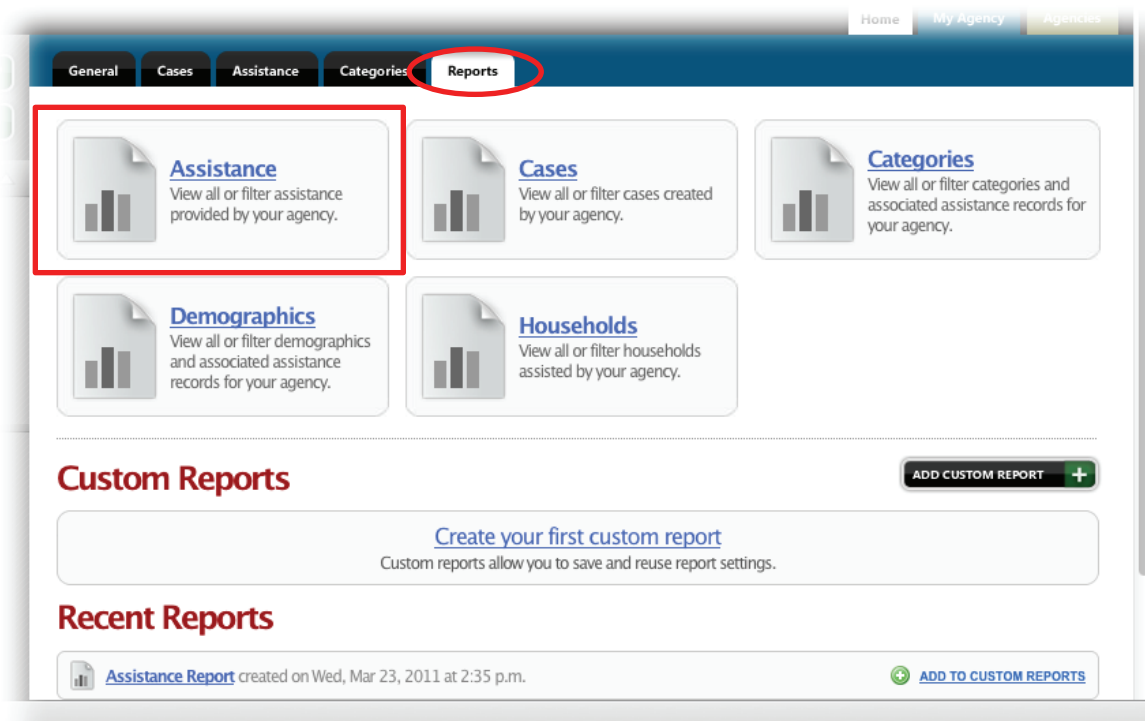




The Reports sub-tab is where you go to run all the reports that pertain to your agency. There are seven categories to report on (see the picture below).

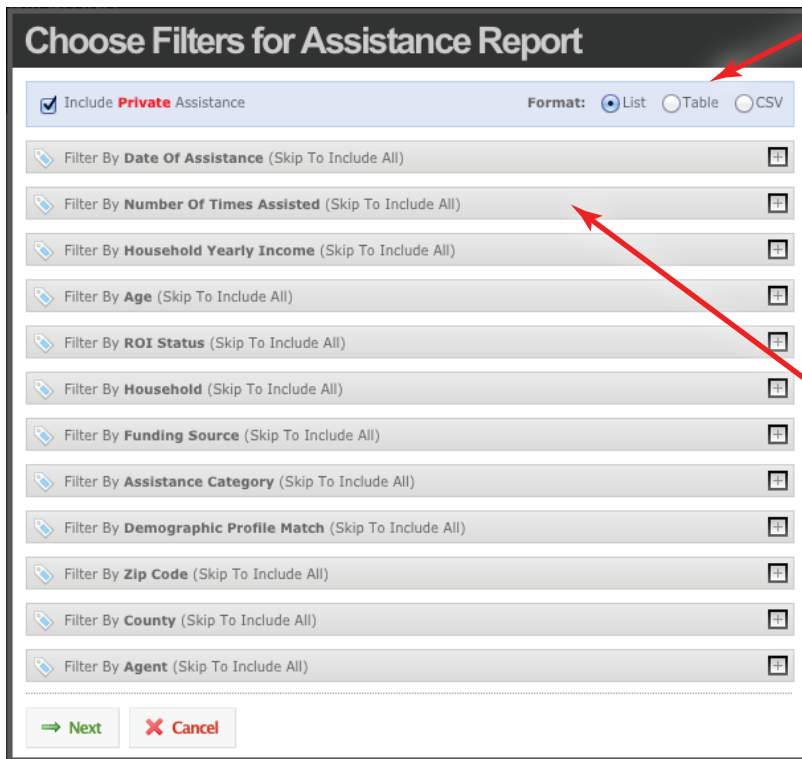
Also on this sub-tab is a list of all your Custom Reports. You can tailor a report to your specifications and run it whenever you need to.

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.



Running a report is a simple process. Let's go over the steps.

For this example, we are going to run an Assistance report. This report will give you a record of all the assistance your agency has provided during a time period that you specify. When you click the button for the Assistance report (shown above in the red box), the following window will open.



**Choose Filters for Assistance Report**

Include **Private** Assistance      Format:  List  Table  CSV

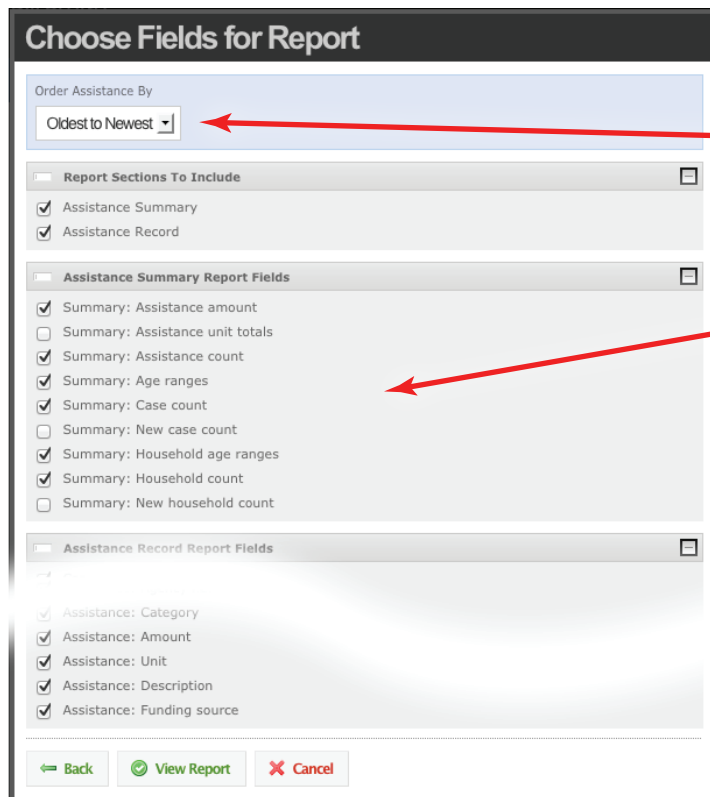
- Filter By **Date Of Assistance** (Skip To Include All)
- Filter By **Number Of Times Assisted** (Skip To Include All)
- Filter By **Household Yearly Income** (Skip To Include All)
- Filter By **Age** (Skip To Include All)
- Filter By **ROI Status** (Skip To Include All)
- Filter By **Household** (Skip To Include All)
- Filter By **Funding Source** (Skip To Include All)
- Filter By **Assistance Category** (Skip To Include All)
- Filter By **Demographic Profile Match** (Skip To Include All)
- Filter By **Zip Code** (Skip To Include All)
- Filter By **County** (Skip To Include All)
- Filter By **Agent** (Skip To Include All)

First, you need to select the format most appropriate for your needs. The List and Table formats will allow you to view the report prior to printing. The CSV format will take about 15 minutes, and when it is complete you will be notified by email. You can download your report and open it in a spreadsheet program like Excel.

Next, select the filters to customize your report. Click on each filter and check the appropriate box(es).

**Note:** *If you do NOT modify a filter, the report will include all information represented by that filter.*

Now click the Next button to go on to the final step.



**Choose Fields for Report**

Order Assistance By:

Report Sections To Include

- Assistance Summary
- Assistance Record

Assistance Summary Report Fields

- Summary: Assistance amount
- Summary: Assistance unit totals
- Summary: Assistance count
- Summary: Age ranges
- Summary: Case count
- Summary: New case count
- Summary: Household age ranges
- Summary: Household count
- Summary: New household count

Assistance Record Report Fields

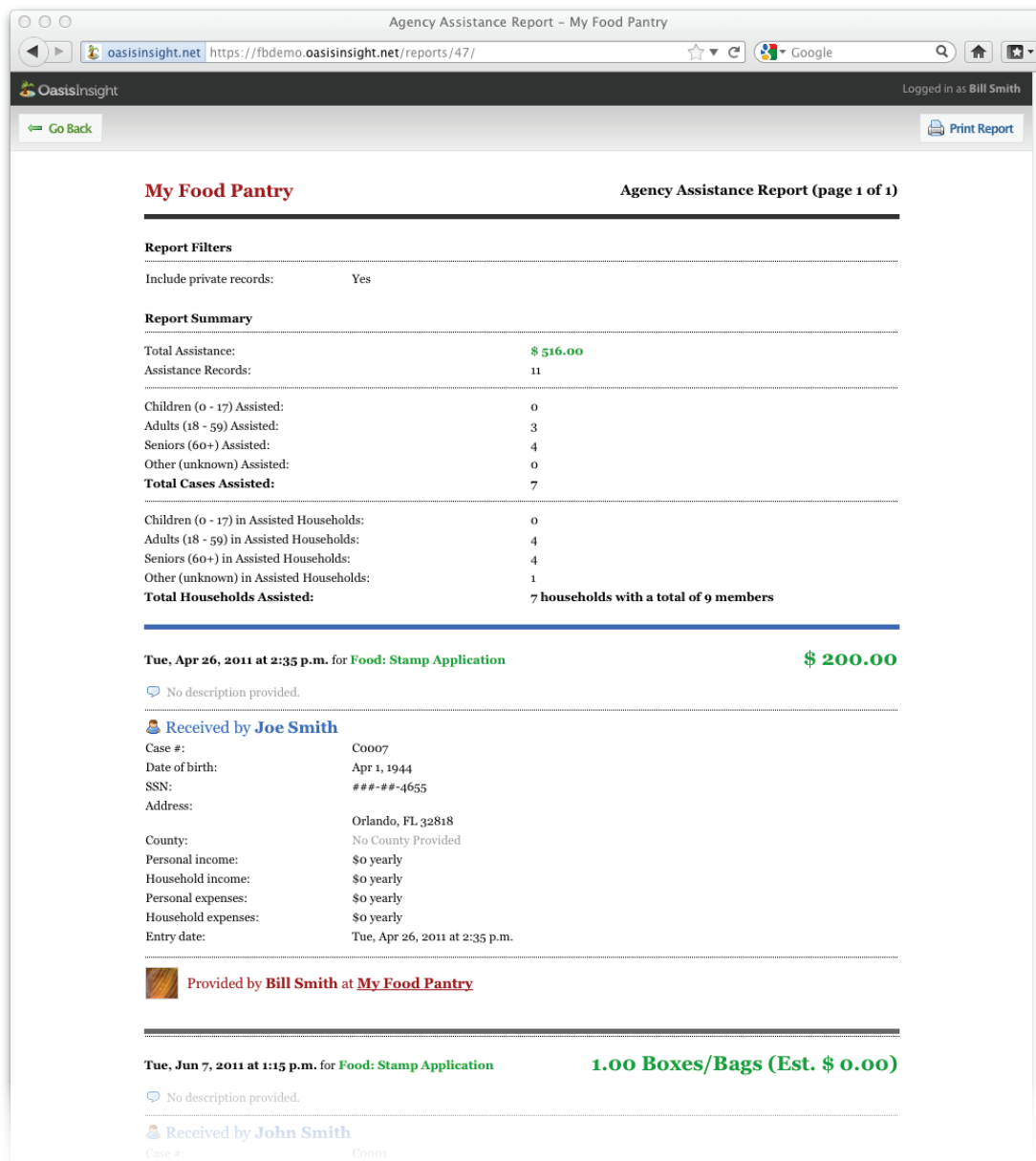
- Assistance: Category
- Assistance: Amount
- Assistance: Unit
- Assistance: Description
- Assistance: Funding source

Now you're ready to fine tune your report to include only the information you need.

First, when you click the down arrow for "Order Assistance By", you can order by Oldest to Newest, Newest to Oldest, Category Name, or Case Name.

Next, you simply check or uncheck the boxes beside each description to select the fields you need.

Once you have selected the information you need, click the View Report button. Oasis will open a page containing your report.



Agency Assistance Report – My Food Pantry

oasisinsight.net https://fbdemo.oasisinsight.net/reports/47/

OasisInsight Logged in as Bill Smith

Go Back Print Report

### My Food Pantry Agency Assistance Report (page 1 of 1)

**Report Filters**

Include private records: Yes

**Report Summary**

Total Assistance:	\$ 516.00
Assistance Records:	11
Children (0 - 17) Assisted:	0
Adults (18 - 59) Assisted:	3
Seniors (60+) Assisted:	4
Other (unknown) Assisted:	0
<b>Total Cases Assisted:</b>	<b>7</b>
Children (0 - 17) in Assisted Households:	0
Adults (18 - 59) in Assisted Households:	4
Seniors (60+) in Assisted Households:	4
Other (unknown) in Assisted Households:	1
<b>Total Households Assisted:</b>	<b>7 households with a total of 9 members</b>

---

**Tue, Apr 26, 2011 at 2:35 p.m. for Food: Stamp Application** **\$ 200.00**

No description provided.

**Received by Joe Smith**

Case #: C0007  
 Date of birth: Apr 1, 1944  
 SSN: ###-##-4655  
 Address: Orlando, FL 32818  
 County: No County Provided  
 Personal income: \$0 yearly  
 Household income: \$0 yearly  
 Personal expenses: \$0 yearly  
 Household expenses: \$0 yearly  
 Entry date: Tue, Apr 26, 2011 at 2:35 p.m.

---

**Provided by Bill Smith at My Food Pantry**

---

**Tue, Jun 7, 2011 at 1:15 p.m. for Food: Stamp Application** **1.00 Boxes/Bags (Est. \$ 0.00)**

No description provided.

**Received by John Smith**

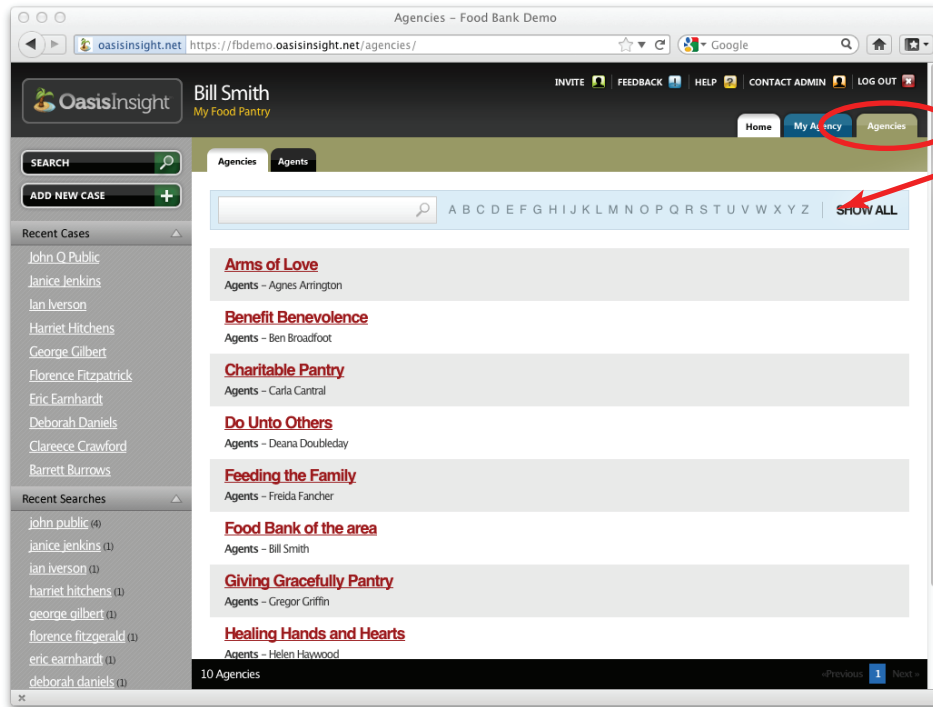
Case #: C1007

To print your report, you can click the Print Report button in the upper right corner of the screen.

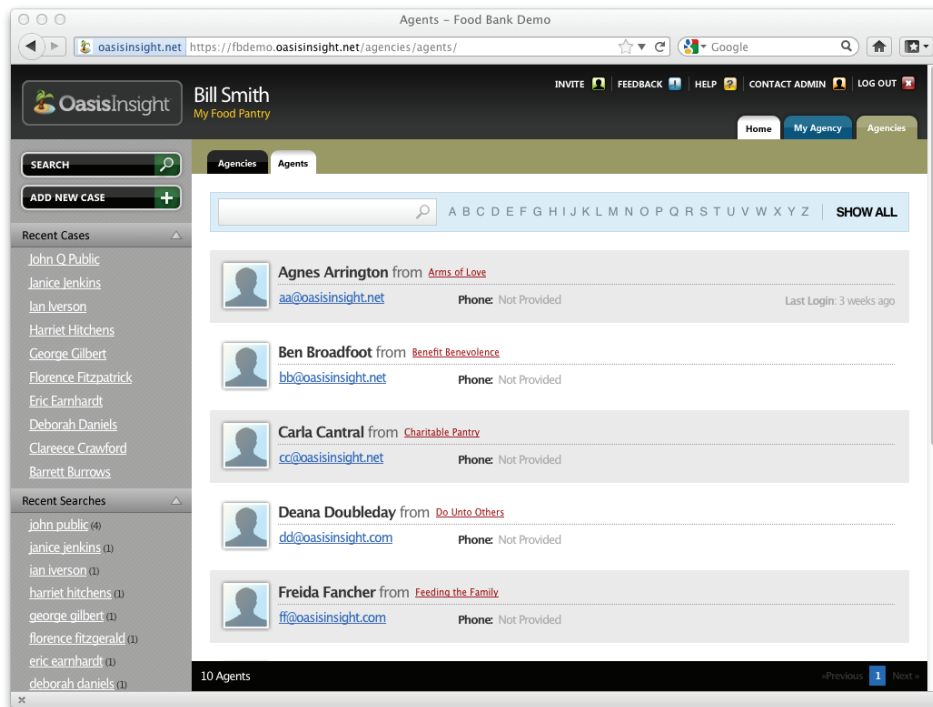
**Tips for Reporting:**

- Everything in the Choose Filters for Assistance Report window (pg. 16) will be included by default.
- We suggest that you run a report and check all the boxes on the second screen (pg. 16). Take a look at what you have and work from there.
- When trying to get demographics, remember that when you select multiple demographics you are asking the system to show you individuals who have ALL those demographics you have selected.
- If you have questions about which report will be most appropriate for your needs, please click the Feedback button in the upper right corner of Oasis and let us know how we can help.

The last thing we will look at is the **Agencies Tab**. The Agencies tab contains a directory of all the agencies in your Oasis network. You can search for an agency, or you can use the alphabetical navigation.



The Agencies tab also contains a directory of all of the agents in your Oasis network.

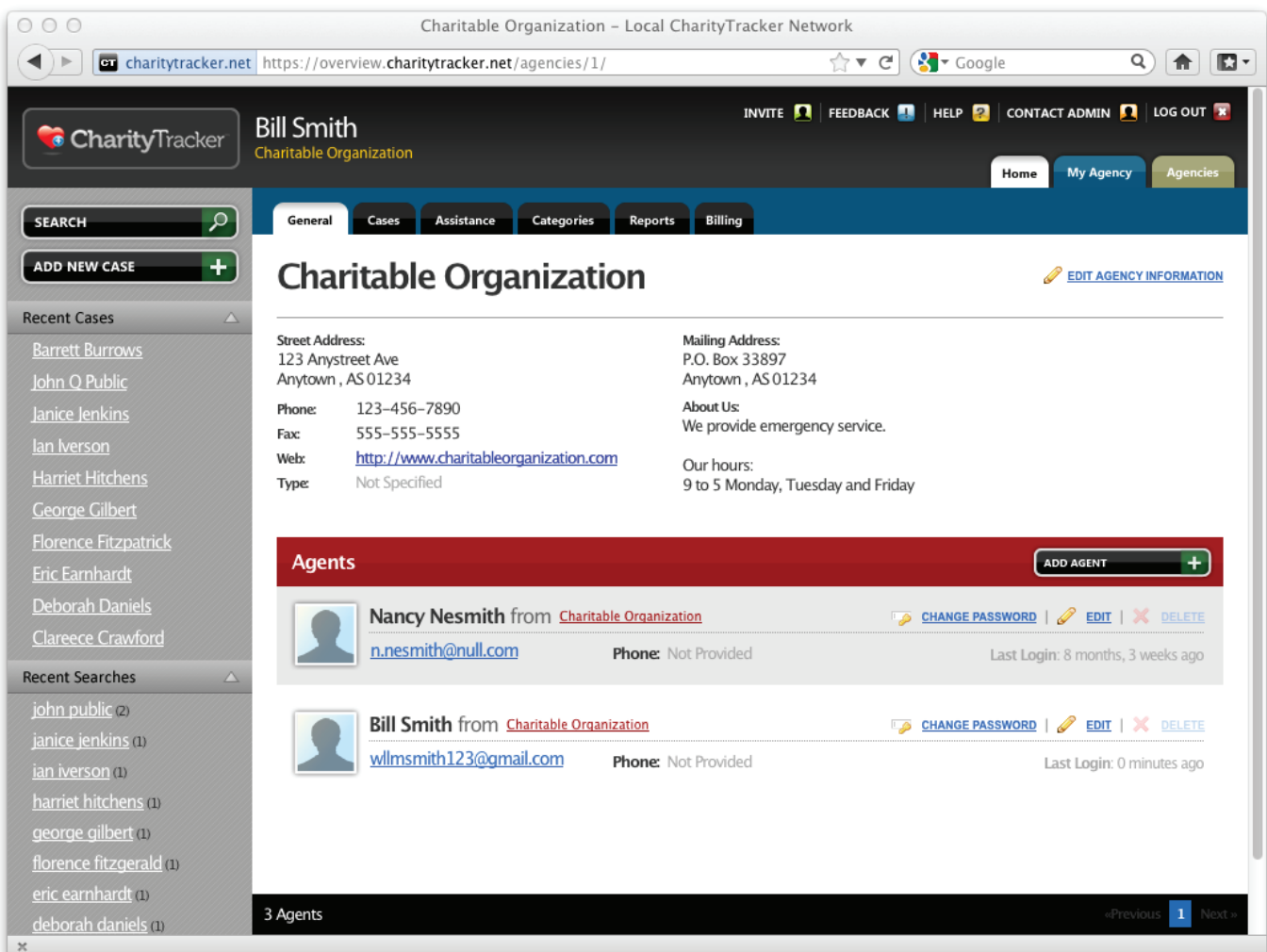


This section of the user guide explains the role of an Agency Administrator (Agency Admin). The Agency Admin enters the information about their agency that appears on their My Agency tab. An Agency Admin can also change the password for an agent if they forget it. (An agent can reset their password themselves if they'd like, by clicking the "Forgot Password" link on the login screen.)

There are two functions an Agency Admin can perform, if those functions have been activated by the Network Administrator:

- The Agency Admin can add new agents to their agency
- The Agency Admin can add custom Assistance categories for their agency.

The Agency Admin will also see a Billing sub-tab on the My Agency tab. This sub-tab is where the Agency Admin can define the Administrative Contact information, and the Billing Contact information. The Billing sub-tab also contains links to Oasis Insight customer support.



The screenshot shows the CharityTracker interface for a 'Charitable Organization'. The user is logged in as Bill Smith. The page has several tabs: General (selected), Cases, Assistance, Categories, Reports, and Billing. On the left, there is a sidebar with a search bar, an 'ADD NEW CASE' button, and lists for 'Recent Cases' and 'Recent Searches'. The main content area shows the organization's details:

- Street Address:** 123 Anystreet Ave, Anytown, AS 01234
- Mailing Address:** P.O. Box 33897, Anytown, AS 01234
- Phone:** 123-456-7890
- Fax:** 555-555-5555
- Web:** <http://www.charitableorganization.com>
- Type:** Not Specified
- About Us:** We provide emergency service.
- Our hours:** 9 to 5 Monday, Tuesday and Friday

Below the organization details is an 'Agents' section with an 'ADD AGENT' button. Two agents are listed:

Agent Name	Email	Phone	Last Login
Nancy Nesmith from Charitable Organization	<a href="mailto:n.nesmith@null.com">n.nesmith@null.com</a>	Not Provided	8 months, 3 weeks ago
Bill Smith from Charitable Organization	<a href="mailto:wllmsmith123@gmail.com">wllmsmith123@gmail.com</a>	Not Provided	0 minutes ago

At the bottom of the agents list, it shows '3 Agents' and a pagination control with '1' selected.