HOPE in Oasis SOP

Contents

Log in to Oasis

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

Find or Add a Client

1. Search for the first and last name of the client (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. You might also check whether the client's name might have been entered with a typo or incorrect spelling. If you can't find the client 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, go through the cases until you find one with a valid TEFAP record and use that one. If you don't find any with a valid TEFAP, you can use any of them as you'll collect all required TEFAP info for them.

Add/Update Their Information

1. For a new case, fill in all required information listed below. For an existing case, update information where it is blank. If someone has a valid TEFAP already, you may just log assistance.

Identification Tab

2. Enter Name, ROI Consent, Date of Birth, Street Address (you can add Phone Number, ID, and Email if your agency wants to use them)
3. Skip Client Referral Services

Eligibility and Income Tab

4. Get TEFAP Eligibility
    a. Enter any "Other Assistance Received" listed (e.g. Medicaid, SNAP) before asking about income
    b. If no "Other Assistance Received", enter any income listed and the time interval
        i.   Put "Not Reported" for Income Sources under "Name".
        ii. If no income, put a 0 in Amount. A blank there means we have not asked.
    c. If no government assistance nor income listed (or they make above the limit for TEFAP eligibility), then ask if there was a crisis that caused them to need food.
        i.   Put "Yes" for "Was there a crisis situation the caused you to need food?"
        ii. List a reason (e.g. inflation, COVID) under "If yes, please state the situation."
5. Enter Household Size
6. Skip Expenses, skip USDA Eligibility Expiration
7. Ask if they would like to authorize anyone to pick up food for them in the future. If so, list that person's full name under Proxy Name. List any additional proxies under Alternative Proxy 1 and Alternative Proxy 2. If the client has more than 3 proxies, include any additional names in the "Alternative Proxy 2" field, separated by commas.

Demographics Tab

8. For HOPE, ask for "Number of Veterans in Household" as this is needed for monthly reporting.
9. These remaining questions are optional, so our neighbors do not have to answer them. Still, this is an important part of our Core Data, so we encourage asking all remaining questions on the Demographics tab: Gender; Race/Ethnicity; number of children, seniors, active-military, and college students; and preferred language.
    a. For numbers in household, please put 0 if none instead of leaving blank.
10. Skip Extra Demographics.

Save Changes

11. Now click "Add Case" or "Save Changes"

Create TEFAP Form

12. On the right side of the case page, click the TEFAP Tab
13. Click "Add form"
    a. Select reason for "Household is eligible based on the following *", based on the following order. (If a person receives government assistance and has low income and/or a crisis, select "Receives Government Assistance." If a person does NOT receive one of the qualifying forms of government assistance but has low income, regardless of whether they have a crisis situation, select "Low Income.")
        i.   Receives Government Assistance Listed Above
        ii. Low Income
        iii. Crisis Food Need
        iv. Note, if you select crisis the certification only lasts 6 months, whereas low income or government assistance lasts 1 year.
    b. Enter your name as "Agent Name *".
    c. Note: Collecting TEFAP signatures is no longer required.

d. Click "Save and Close"
14. Note: ROI Consent (on the Identification tab) is the only field that needs to be updated for ROI. We no longer need to create or verify a document in Oasis for ROI.

Logging Assistance

Each individual that receives a HOPE assistance 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 people live in a house and both get a HOPE assistance, then a HOPE assistance should be logged on each of the clients' Oasis cases.

1. On a specific client's page, 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 HOPE 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 HOPE assistance 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 people live in a house and both get a HOPE assistance, then a HOPE assistance should be logged on each of the clients' Oasis cases.

5. 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.
6. Go to "My Agency," then select the "Assistance," and then select "Add Multiple Assistance."
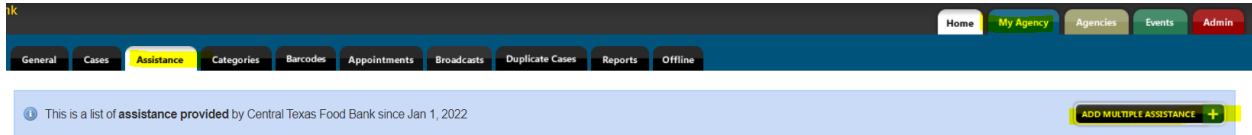
7. Ensure Amount, Unit, Category and Date/Time are correct for your distribution.
8. Enter the Oasis Case ID of a participant and select "Add Case."
9. Continue until you have entered all Case IDs.
10. Select Add Assistance at the bottom left. This will log assistance for all Case IDs you entered.

HOPE Reporting

Oasis allows you to run a report to see how much assistance your organization distributed in a given time period. After entering all HOPE assistance for the month, run a report to see all the HOPE 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.
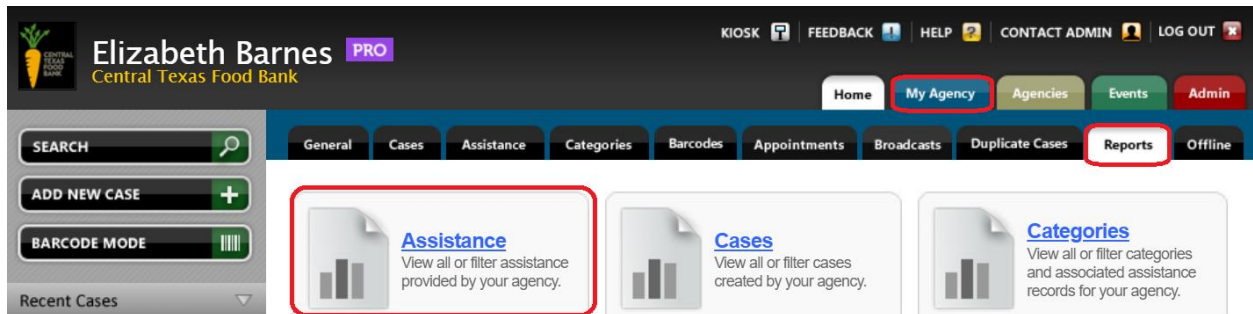

2. Select "Format: Table" to see a summary of visits in Oasis. Select "Format: CSV" to produce a spreadsheet that you can download and open in Excel.
3. Select the Date of Assistance date range to see all assistance entered in that time period. Both start date and end date are required.
4. To see only HOPE assistance, expand the filter "Assistance Category." Select "HOPE Assistance" or, if your organization has multiple HOPE locations, the specific site(s) for which you'd like to see assistance.
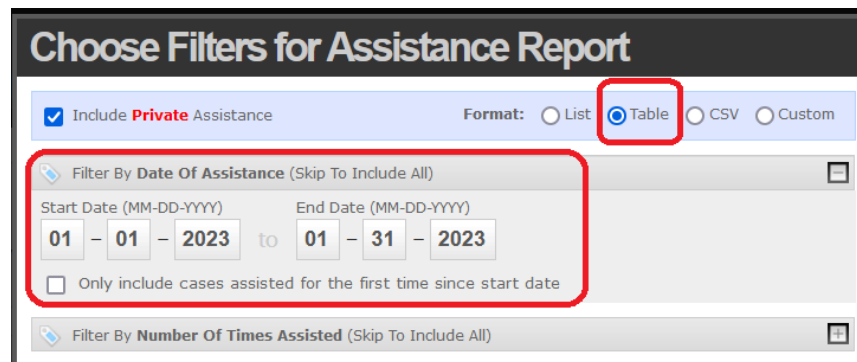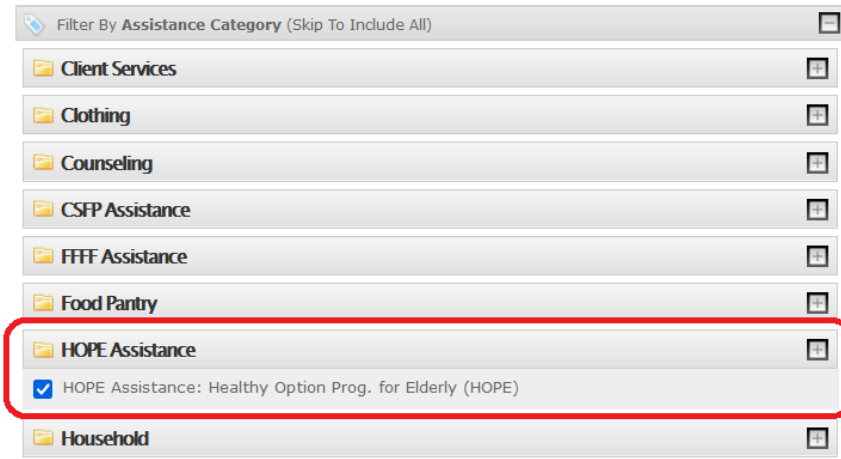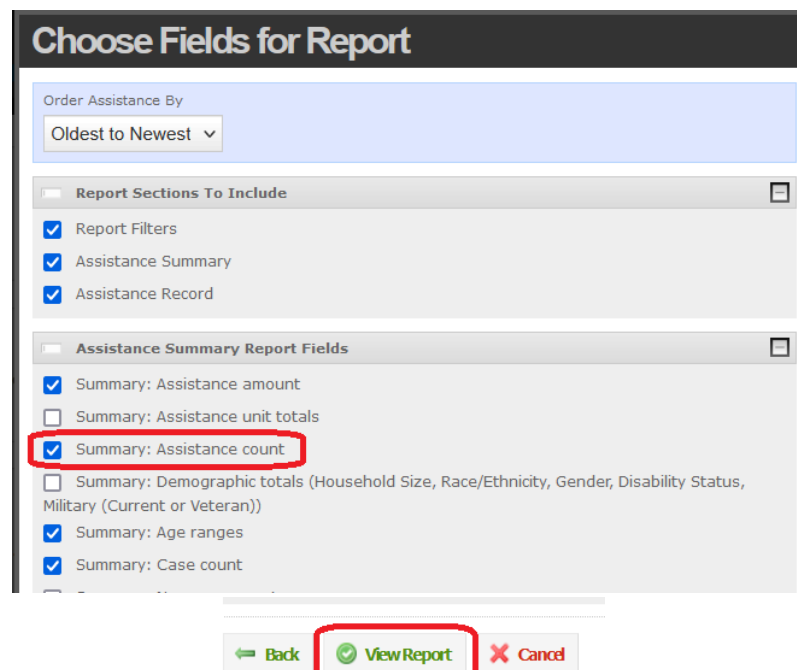
5. Go to the bottom and click Next.
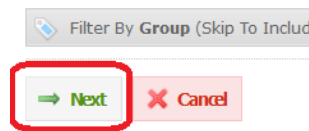
6. Make sure that Assistance Count is selected (it should be preselected), then go ahead and click View Report at the bottom.

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**

Glossary

Assistance—Each time an individual client receives any HOPE food, whether or not they accept all items in their HOPE package, you should record them receiving 1 unit of HOPE 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.

TEFAP – The Emergency Food Assistance Program, the federal program that provides some of the food for HOPE. All HOPE clients must be TEFAP-eligible and should have a current TEFAP form completed on their profile. A new TEFAP form is required every 12 months (or 6, if the client is eligible on the basis of a crisis situation).