WELCOME TO OASIS INSIGHT

1. FOR THESE INSTRUCTIONS, IF IT IS IN A BOX, IT IS A CLICK LOCATION, i.e., SEARCH
   ANY ARROWS YOU SEE ON THE SCREEN ARE FOR THESE INSTRUCTIONS—THEY'RE NOT IN Oasis Insight.

2. SPELLING COUNTS!

3. MULTIPLE PEOPLE CAN BE WORKING IN Oasis Insight AT THE SAME TIME.

4. THIS IS NOT JUST FOR FOOD PANTRY SERVICES, SO EVERY SERVICE FOR A CLIENT THAT IS RECORDED IS DONE SO UNDER THE SAME CLIENT RECORD. IF YOU NEED TO TRACK SOMETHING NOT LISTED, YOU MAY ADD A LOCAL CATEGORY.

OASIS INSIGHT HELP DESK
888-764-0633

LOG –IN PAGE.
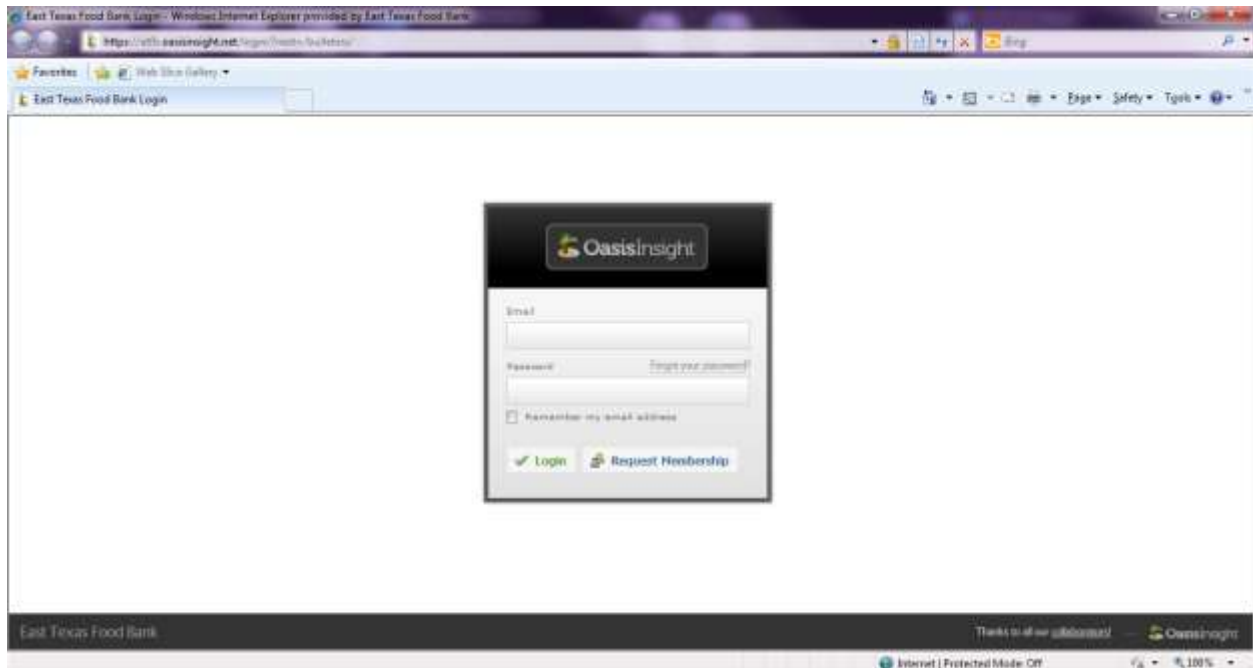
LOG IN: https://etfb.oasisinsight.net/login/?next=/bulletins.   BE SURE CAPS LOCK IS OFF. **ALL PERSONS ACCESSING OASIS INSIGHT WILL NEED THEIR OWN E-MAIL ADDRESS LOGIN AND PASSWORD.**
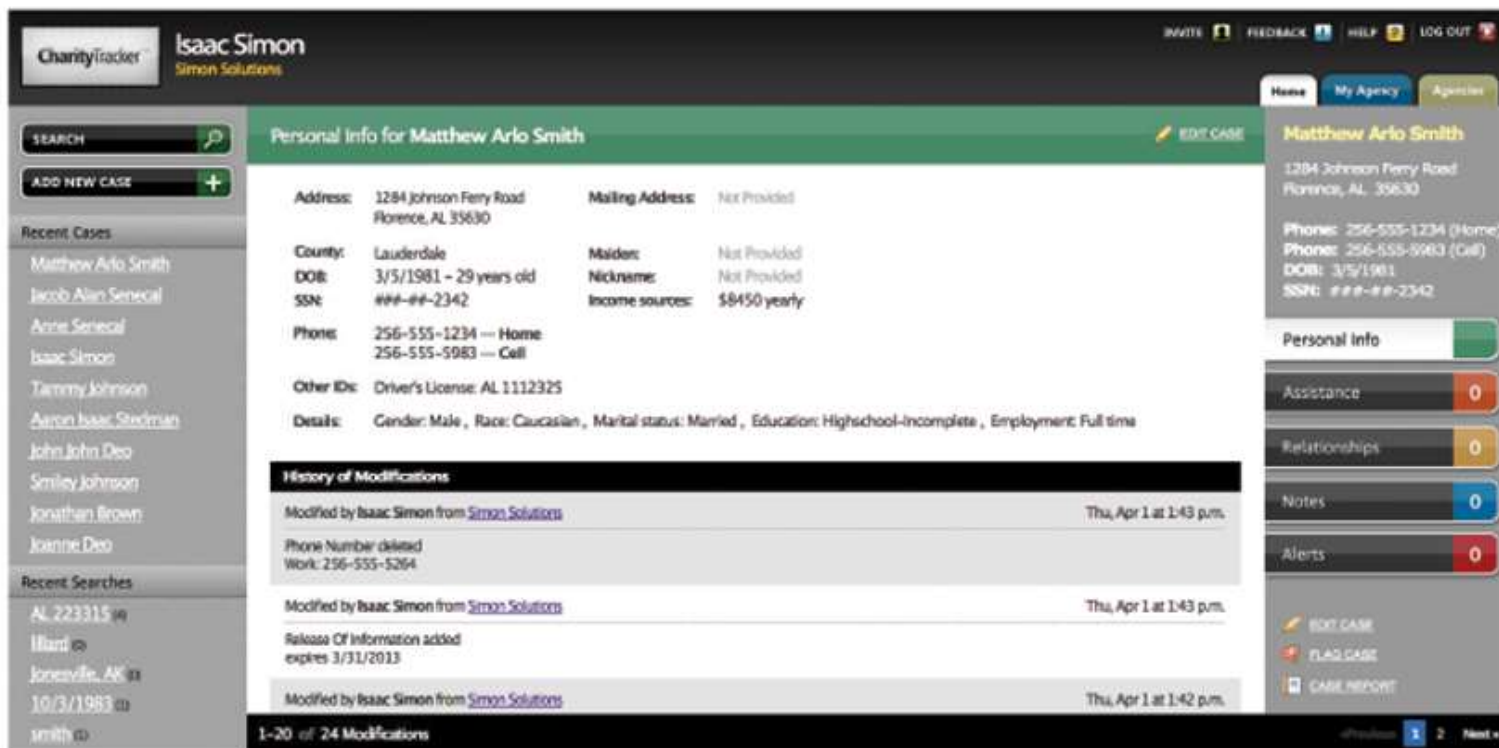
1 The **Personal Info** tab gives you an overview of personal identifying information for a case. If you need to make a change to a case's personal information, you can click the "EDIT CASE" link. You will see all changes made to the case displayed in the "History of Modifications" list.

2 The **Assistance** tab allows you to view all past assistance records and add new ones to a case. Click the "Add Assistance" button, enter a value, choose a category, and then click the "Add" button.

3 The **Relationships** tab allows you to keep track of other cases that are related to the individual you're looking at. Simply click the "Add Relationship" button to add a relationship.

4 The **Notes** tab is where you can write notes to associate with a case. Notes are an easy way to remember important information about a case. When you are in a case, click on the Notes tab and then the "Add Note" button.

5 The **Alerts** tab is the place where you can give a heads-up to other agents in your network about a certain case. Alerts allow you to notify everyone in the network of suspicious activity, or perhaps there's a need that your agency alone cannot meet. Click the Alerts tab when you are in a case and then the "Add Alert" button.

Flag Case

The "Flag Case" button, located at the bottom right of a case, allows you to send a message to the network administrator if you notice an issue with a case. For example, you can use this feature if you notice two cases for the same individual and they need to be merged into one. The administrator will be notified of the flagged case via email.

Case Report

You can generate a printable report for a case which will include a summary of all personal info, assistance records, relationships and notes.

case.

<div align="center">*CLIENT ARRIVES*

ARE THEY IN OASIS INSIGHT?</div>

5. SEARCH .FROM THE OASIS INSIGHT MAIN SCREEN. YOU MAY SEARCH BY FIRST NAME, LAST NAME, OR BOTH, BIRTHDAY OR EVEN ID #. **SEARCHING BY BIRTHDAY IS MOST ACCURATE** TO FINDING THE CLIENT AS SPELLING WILL NOT BE AN ISSUE. SEARCHING FIRST NAME LAST NAME VERSUS LAST NAME FIRST NAME DISPLAYS RESULTS IN A DIFFERENT ORDER.

6. EXACT MATCHES, IF ANY, ARE SHOWN FIRST IN THE LIST WITH PARTIAL MATCHES FOLLOWING. THIS SEARCH FOUND ONLY PARTIAL MATCHES.
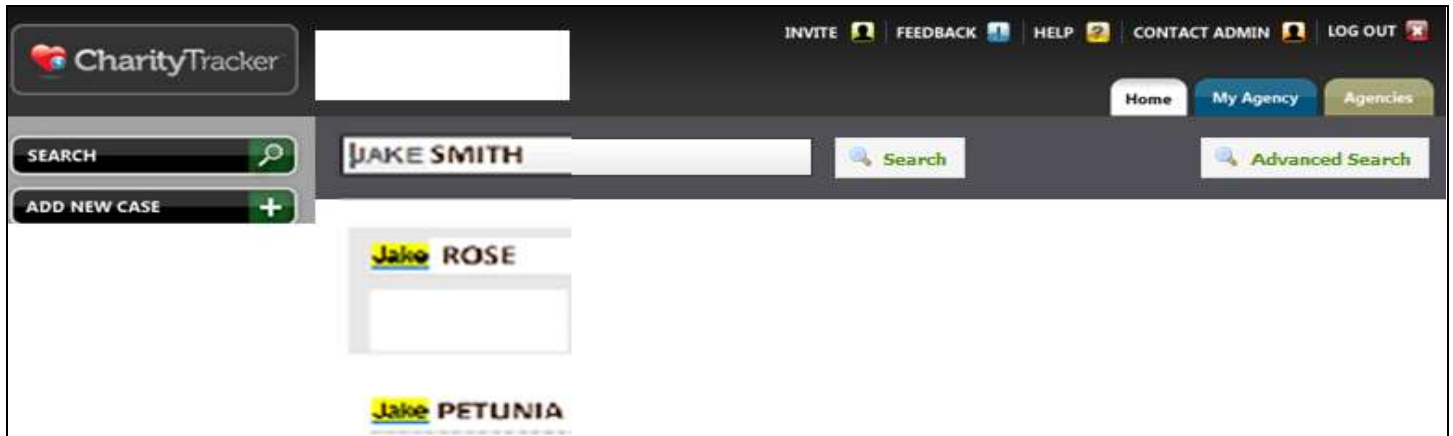
ADVANCED SEARCH WHEN YOU ARE ADDING NEW CLIENTS **USE THE DATE OF BIRTH SECTION** TO CHECK FOR EXISTING CASES IN OASIS INSIGHT, IF YOU ARE STILL UNABLE TO FIND THE CLIENT TRY SEARCHING BY THEIR NAME INSTEAD.

<div align="center">*OASIS INSIGHT SEARCH RESULTS DID NOT FIND THE CLIENT*</div>

ADD NEW CASE.FROM THE LEFT SIDE OF THE SCREEN.

ADD NEW CASE

1. NOTE THE TOP 2 TABS: **IDENTIFICATION,** AND **DEMOGRAPHICS**. THIS SCREEN IS IDENTIFICATION.

2. DO NOT CLICK ON ADD CASE YET. YOU'RE NOT FINISHED. SCROLL BACK TO THE TOP OF THE PAGE.

3. CLICK ON DEMOGRAPHICS.

4. ADD CASE TO SAVE
5. A SUMMARY SCREEN APPEARS KIND OF LIKE THIS:

6. ADD OTHERS IN THE HOUSEHOLD IN THE RELATIONSHIPS TAB ON THE RIGHT.

BUT, UNDERLINE PERSON ADDED ON THE RELATIONSHIPS SCREEN BECOMES A *NEW* OASIS INSIGHT CASE. THIS WILL ASSIGN THEM A CASE NUMBER REGARDLESS OF AGE OR HOUSEHOLD STATUS.

BEFORE YOU ADD THEM, YOU NEED TO KNOW IF THEY ARE ALREADY IN OASIS INSIGHT AND HAVE BEEN ADDED BY ANOTHER PANTRY. (SEARCH FOR ALL RELATIONSHIPS PRIOR TO ADDING TO THE HOUSEHOLD) IF NOT FOUND THEN ADD.

7.   FROM THE RELATIONSHIPS SCREEN,
      SEARCH FOR EXISTING CASE

      TYPE IN THE NAME, THEN SEARCH.

8.   IF OASIS INSIGHT FINDS MATCHING NAME(S), THEY WILL APPEAR HERE. EITHER CHOOSE ONE OR
      CANCEL IF NONE OF THEM MATCH YOUR CLIENT. DO NOT ADD A NEW PERSON TO OASIS INSIGHT.

      IF THIS IS YOUR JOHN DOE, CLICK ON HIS HIGHLIGHTED-IN-YELLOW NAME. YOU WILL THEN SEE SOMETHING LIKE
      THIS:

WHEN YOU CLICK ON THE BOX A RELATIONSHIP DROP DOWN WILL APPEAR. ADD THE CORRECT RELATIONSHIP AND THEN
CHECK THE TWO BOXES IN THE BOTTOM LEFT CORNER. THIS PLACES THE CLIENT INTO THE HOUSEHOLD.

9. IF IT DOESN'T FIND ANYONE AT ALL, YOU WILL GET AN "OOPS" MESSAGE.

CANCEL . IT RETURNS YOU TO THE ORIGINAL CLIENT'S RELATIONSHIPS SCREEN. ENTER INFORMATION IN THE RELATIONSHIPS SCREEN FOR HOUSEHOLD MEMBERS WHO DID NOT HAVE EXISTING CASES.

AFTER ALL RELATIONSHIPS HAVE BEEN ENTERED, ADD HOUSEHOLD MEMBERS.

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10. AFTER ALL THE RELATIONSHIPS HAVE BEEN ADDED, IT WILL GO TO A SUMMARY SCREEN.

11. SIGNING THE BACK OF THE CLIENT APPLICATION IS OUR APPROVAL TO ENTER THE CLIENT INTO OASIS INSIGHT. **IF THERE IS NOT A CURRENT "ROI" WITHIN THE LAST ELEVEN MONTHS, YOU WILL NEED TO COMPLETE A NEW "ROI". THIS DOCUMENTS THAT THE *PANTRY INTAKE FORM HAS BEEN COMPLETED* AND SIGNED BY THE HOUSEHOLD.**

12. THEN THIS SCREEN APPEARS. THE NAME OF THE PERSON WHO LOGGED ON WILL APPEAR IN THE FIRST LINE. OK
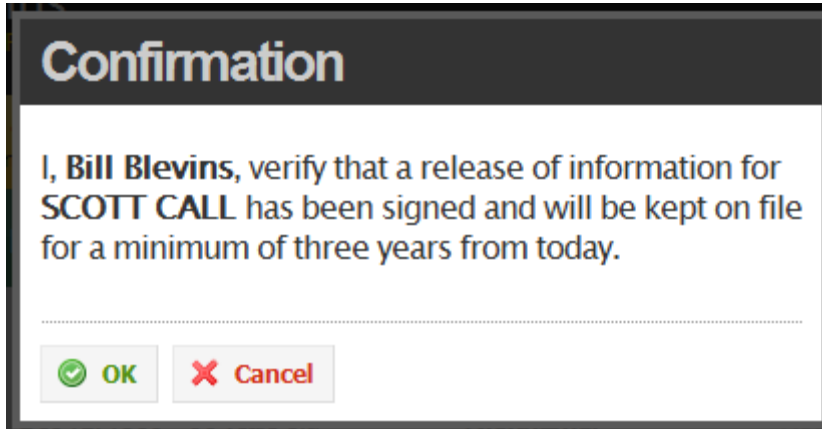
13. YOU ARE RETURNED TO THE CLIENT'S PERSONAL INFO PAGE.

14. IF YOU NEED TO ADD A NOTE, CLICK ON THE NOTES TAB. IF THIS IS THE FIRST NOTE FOR THIS PERSON:

Create the first note

Notes are an easy way to remember important information about this person. For example, you could make a note that this person was recently laid off from their job.
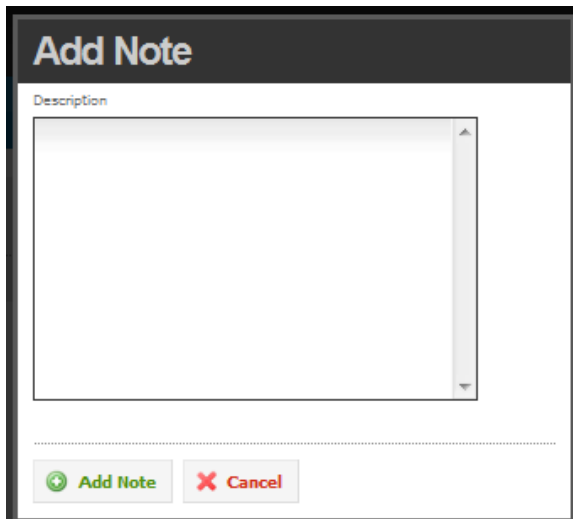
BE CIRCUMSPECT IN YOUR NOTES. THESE MAY NOT BE PRIVATE TO THE AGENCY THAT ENTERED IT.
ADD NOTE TO SAVE.

15. IT THEN TAKES YOU TO A NOTES SUMMARY SCREEN:
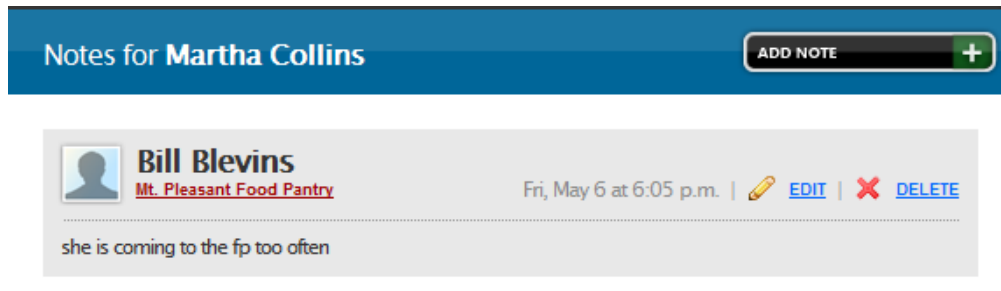
16. **TO RECORD ASSISTANCE,** LOOK TO THE RIGHT AND CLICK ON ASSISTANCE.
CREATE THE FIRST ASSISTANCE RECORD (WILL ONLY SHOW FOR THE VERY FIRST ASSISTANCE RECORD OF ANY KIND
OF ASSISTANCE).

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

17. CHOICES FOR THE FOOD PANTRY:

ASSISTANCE: 1
UNIT: BOX
CATEGORY: FOOD: PANTRY BOX
DESCRIPTION IS THE DATE OF THE SERVICE, I.E., 6/1/11
ADD TO SAVE.

NOTE: SELECT THE SAME CATEGORY AS AN
AGENCY, TO INSURE ALL ASSISTANCE
RECORDS ARE COUNTED EACH MONTH FOR
YOUR LOCATION.

WAIT FOR THE 0 TO CHANGE TO 1, OR FOR EXISTING CLIENTS, THE NUMBER
THEY HAD SHOULD INCREASE BY 1.   WHEN YOU ARE FINISHED, YOU ARE
READY TO SEARCH FOR THE NEXT CASE.

 THUS ENDETH INSTRUCTIONS FOR CLIENTS NEW TO OASIS INSIGHT…

ENTERING MULTIPLE ASSISTANCE RECORDS

1. GO TO YOUR ASSISTANCE TAB. CLICK ON THE "ADD MULTIPLE ASSISTANCE". **DO NOT USE**: **ADD A REQUEST – THIS IS FOR THE SENIOR BOX PROGRAM .** IT DOES NOT ADD ASSISTANCE FOR THE CLIENT.
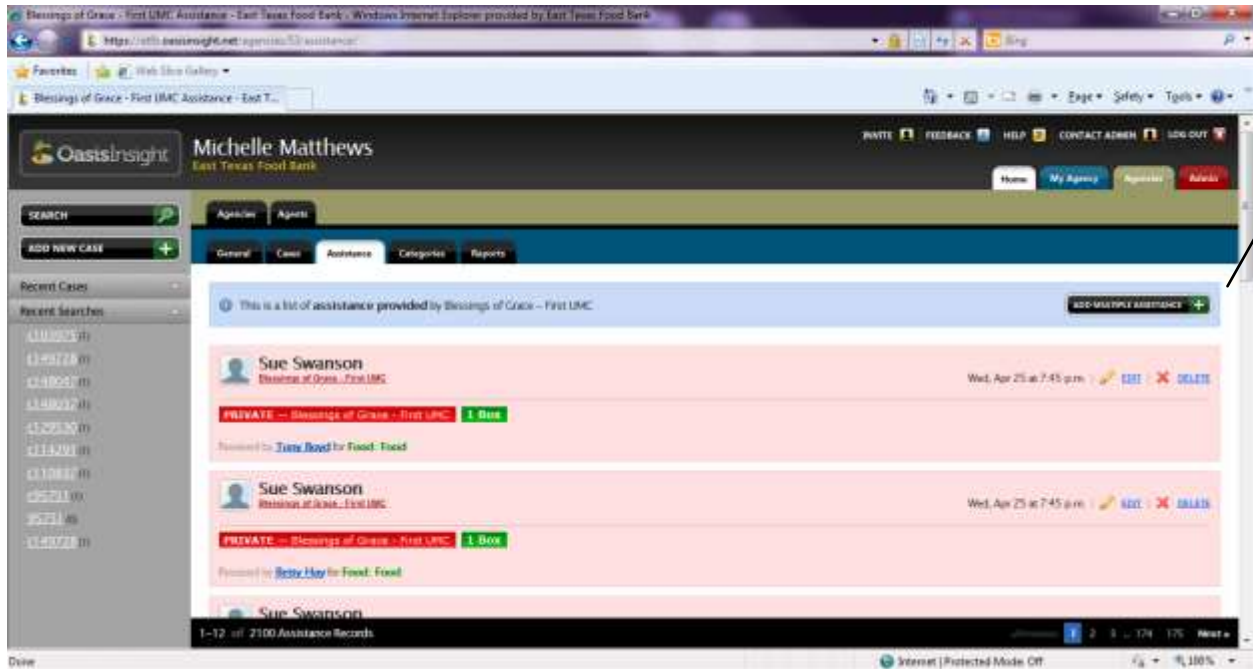
2. THIS OPTION ALLOWS FOR YOU TO ENTER ALL ASSISTANCES WITH CASE NUMBERS AT ONE TIME. THIS FEATURE WILL CUT DOWN ON THE AMOUNT OF TIME DOING DATA ENTRY.
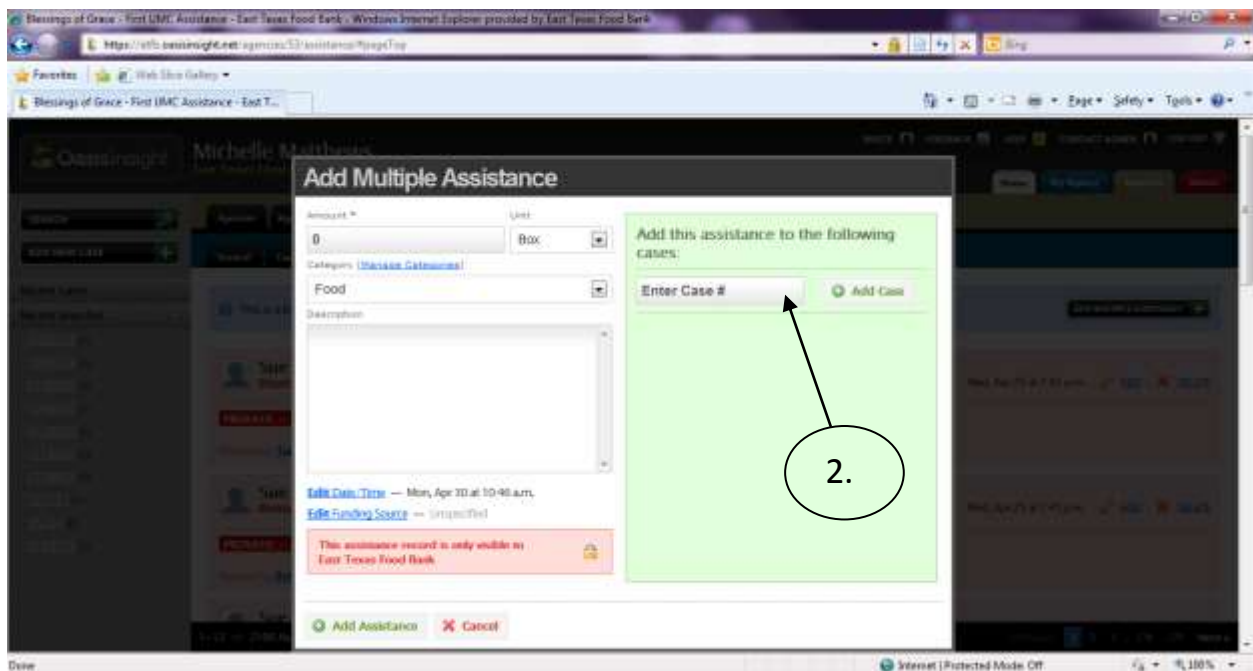
3. YOU WILL ENTER THE AMOUNT, THE UNIT, AND THE CATEGORY. IF YOU ARE DOING DATA ENTRY FOR ON THE DATE THE FOOD WAS RECEIVED YOU WILL GO TO THE "ENTER CASE #" FIELD AND ADD CASES.

4. IF YOU ARE ENTERING DATA AT A LATER DATE YOU WILL NEED TO EDIT DATE/TIME. THIS IS VERY IMPORTANT WHEN DATA ENTRY IS BEING DONE AT A LATER TIME.

5. YOU CAN ENTER AS MANY CASES AS YOU WOULD LIKE , **I RECOMMEND ONLY ENTERING ENOUGH FOR THE PAGE** YOU CAN SEE. THE PAGE WILL TIME OUT AND ENTRIES BE LOST IF NOT COMPLETED BEFORE CLICKING ON THE "ADD ASSISTANCE" BUTTON.
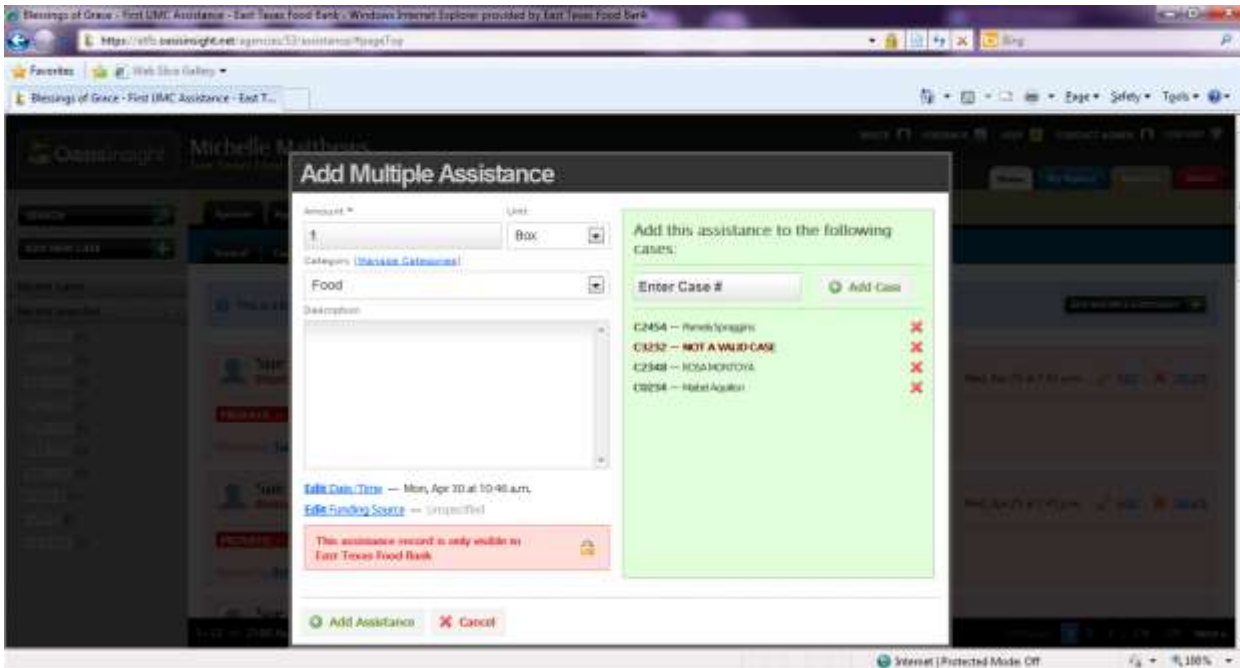
6. YOU CAN SEE THE CASE NUMBER AND THE PERSONS NAME ASSOCIATED WITH THAT NUMBER. YOU WILL ALSO SEE IF YOU HAVE A "NOT A VALID CASE". YOU CAN MAKE CHANGES BY CLICKING THE RED "X" AND RE-ENTERING THE INFORMATION.

7. CLICK "ADD ASSISTANCE" AT THE BOTTOM OF THE SCREEN. YOU HAVE NOW ENTERED AN ASSISTANCE RECORD FOR EACH CASE NUMBER YOU HAVE ENTERED. THIS CAN ONLY BE DONE IF YOU HAVE THE CASE NUMBERS. A REPORT CAN BE RAN TO ASSIST YOU.

1. **Critical Step** WHEN YOU LOOK UP A REPEAT CLIENT IN OASIS INSIGHT, YOU SHOULD FIND THEM—OR MULTIPLE PEOPLE WITH THE SAME NAME. IF IT FINDS MULTIPLE PEOPLE WITH THE SAME NAME, CHOOSE THE CORRECT RECORD. IF THEY JUST MOVED TO YOUR COUNTY AND WERE IN OASIS INSIGHT WITH ANOTHER FOOD PANTRY, IT WILL FIND THEIR CASE RECORD AND YOU SHOULD **THEN UPDATE** THE ADDRESS, ETC**. WE DO NOT WANT TO CREATE A NEW CASE # IF THEY ALREADY HAVE ONE.**
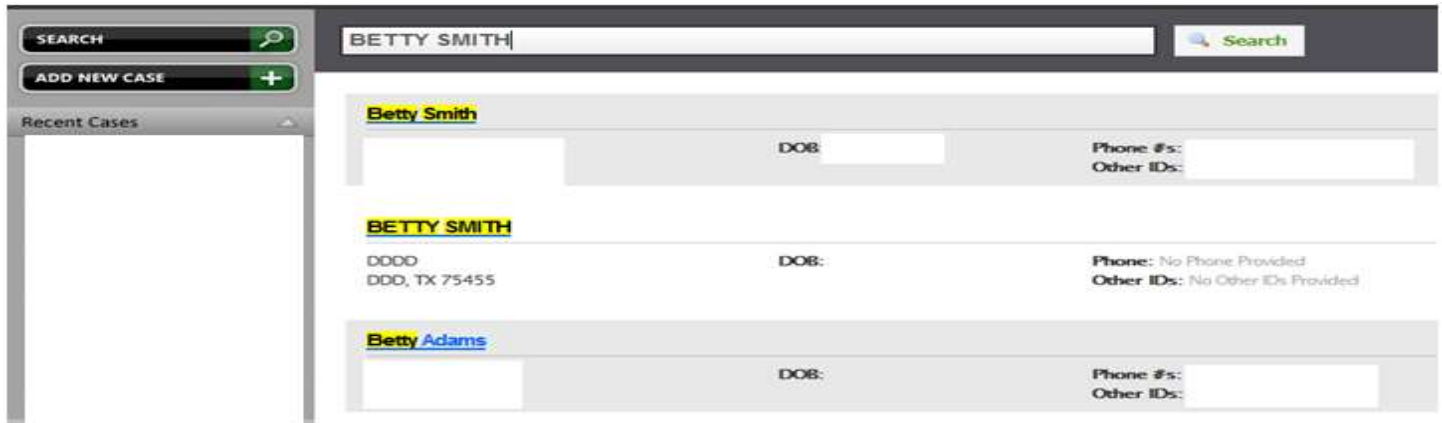
2. SEARCH AND CLICK ON THEIR NAME TO GO TO THEIR RECORD.

3. EDIT ANY INFORMATION THAT NEEDS TO BE UPDATED, INCLUDING RELATIONSHIPS.

4. IF THEY HAVE ALREADY HAD ASSISTANCE IN ANY AREA, CLICK ON ASSISTANCE. YOU WILL THEN GET A SUMMARY SCREEN WHERE YOU HAVE TO CLICK ON THIS TOP RIGHT BUTTON, ADD ASSISTANCE.
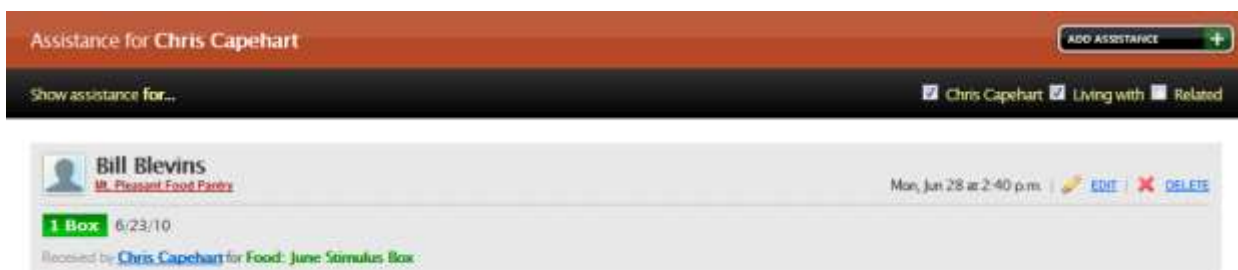
5. ADD THE DATA FOR THE NEW SERVICE. GIVE IT A SECOND OR TWO FOR THE ASSISTANCE NUMBER TO CHANGE.

6. NOW YOU ARE READY FOR THE NEXT CASE.

OOPS—YOU FORGOT TO SEARCH BEFORE ADDING A NEW CASE

IF YOU FORGOT TO SEARCH AND WENT STRAIGHT TO ADD NEW CASE, AND THEY WERE ALREADY IN THE SYSTEM, IT SHOULD GIVE YOU A MESSAGE SIMILAR TO THIS:
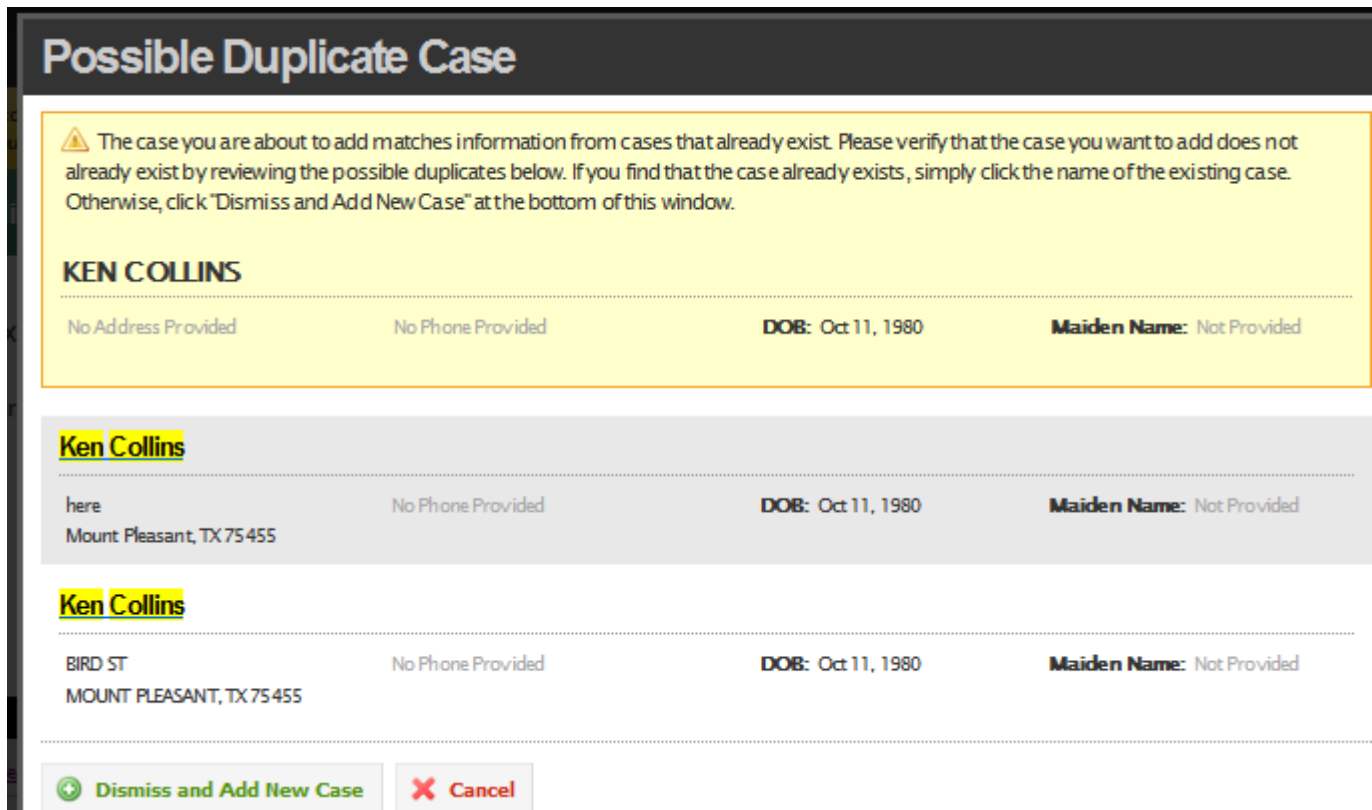
DECIDE IF ANY OF THE FOUND CASES ARE YOUR CASE YOU ARE LOOKING FOR AND EITHER CHOOSE IT, OR DISMISS AND ADD NEW CASE. MAKE SURE TO SEARCH CAREFULLY SO AS NOT TO CREATE DUPLICATES.

WHAT ABOUT THE OTHER STUFF ON THE RIGHT—BELOW THE TABS?

EDIT CASE IS THE SAME AS THE OTHER TAB IN PREVIOUS SCREENS.

FLAG CASE   SEND TYLER MESSAGES ABOUT THINGS LIKE DUPLICATE RECORDS. THEY HAVE THE RIGHTS TO MERGE THE CASES.

CASE REPORT: A COMPUTER REPORT ON STUFF ENTERED FOR THIS CLIENT..

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Revised April 2019

<center>***ENDING A RELATIONSHIP***</center>

1. THE CLIENT TELLS YOU THAT ONE OR MORE PERSONS NO LONGER LIVE WITH THEM.

2. OPEN UP THE CLIENT'S RECORD. GO TO **RELATIONSHIPS**.

3. FIND THE PERSON WHO NO LONGER LIVES THERE. IF THE PERSON IS A RELATIVE AND LIKELY TO MOVE BACK IN **EDIT** THE RELATIONSHIP AND UNCHECK THE TWO SMALL BOXES ON THE BOTTOM LEFT. THIS REMOVES THEM FROM THE HOUSEHOLD BUT KEEPS THEM AS A RELATIONSHIP. IF THEY ARE LIKELY NOT TO RETURN YOU MAY **DELETE** THE RELATIONSHIP. THIS DOES <u>NOT</u> DELETE THEIR CASE, JUST THEIR RELATIONSHIP WITH THIS CLIENT.

4. YOU WILL GET THIS MESSAGE. **OK**

<center>16</center>
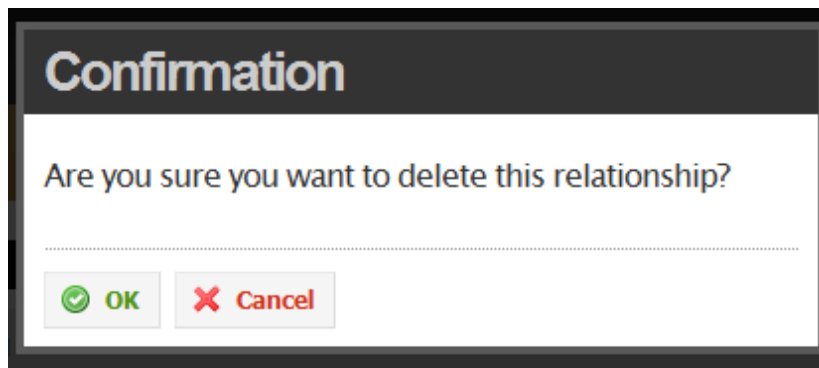
REPORTS

WE WILL ALL HAVE TO PLAY WITH REPORTS BEFORE WE WILL KNOW WHICH ONES WE REALLY NEED TO RUN FOR WHAT PURPOSE. HERE IS ONE WE MIGHT USE TO DOUBLE CHECK OUR BALANCING NUMBER EACH DAY:

CLICK ON MY AGENCY TAB, TOP RIGHT:
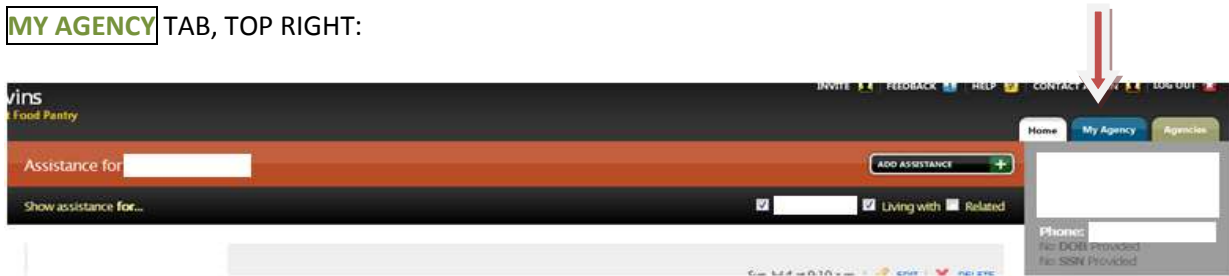
CLICK ON THE REPORTS TAB:
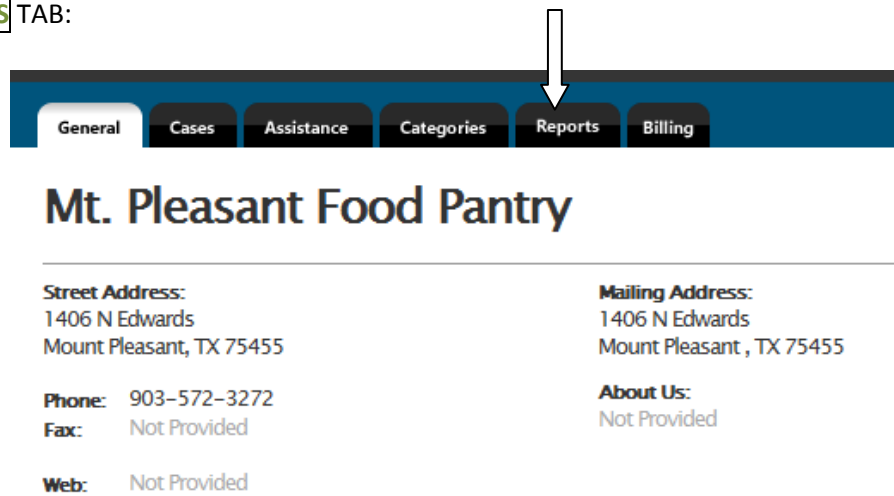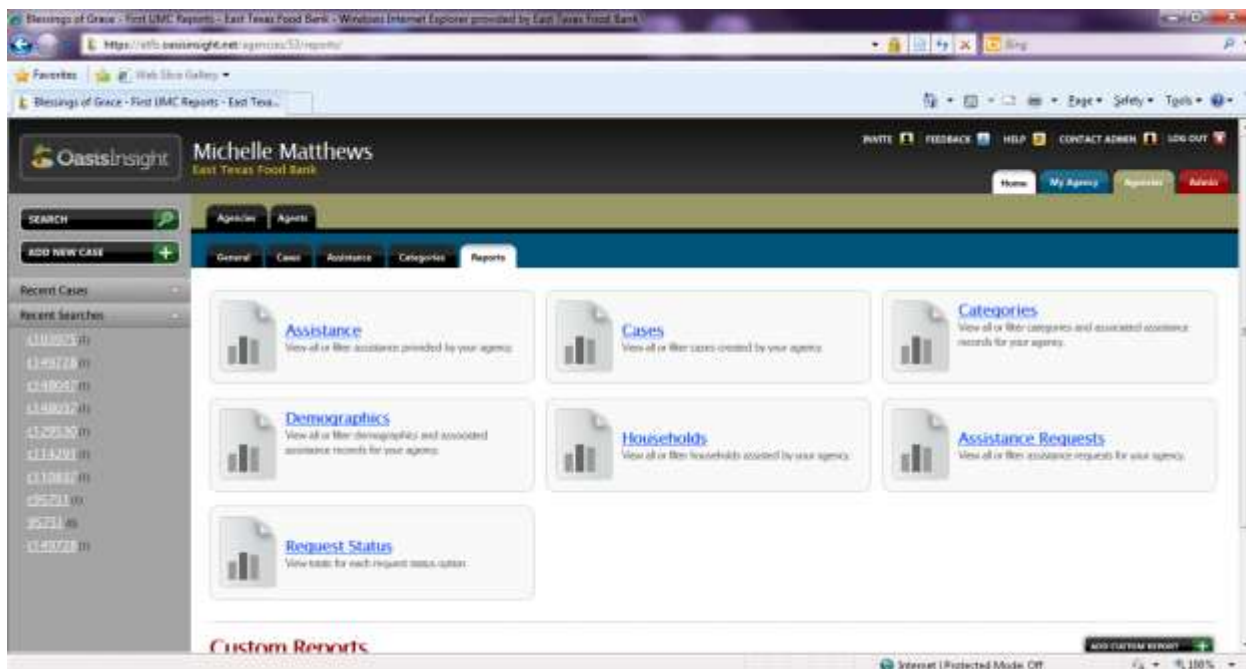

HERE ARE THE REPORTS CHOICES:

CLICK ON ASSISTANCE TAB AND THE MENU BELOW COMES UP:

YOU WILL NEED TO CHOOSE THE FORMAT THAT YOU WOULD LIKE TO SEE THE REPORT IN.

LIST: THIS IS A REPORT THAT WILL LIST ALL INFORMATION (VERY SIMPLE REPORT)

TABLE: THIS IS ANOTHER TYPE OF REPORT THAT YOU CAN SEE A LITTLE DIFFERENTLY, BUT ONCE THE REPORT IS RAN YOU CAN NOT MAKE CHANGES TO IT.

CSV: THIS IS A REPORT THAT TAKES A FEW MINUTES TO RECEIVE, COMES TO YOU IN AN EMAIL AND CAN BE LOADED INTO A PROGRAM, SUCH AS EXCEL, AND CAN BE MANIPULATED ANYWAY YOU WOULD LIKE TO USE IT.

ENTER **DATE OF ASSISTANCE+** AND PUT THE DATE YOU ENTERED THE DATA, NOT THE DATE OF SERVICE, IF THEY ARE DIFFERENT. **ASSISTANCE CATEGORY+** AND CHOOSE **FOOD: PANTRY BOX.** YOU CAN LEAVE EVERYTHING ELSE AS IT IS.

NEXT **THEN LEAVE EVERTHING ON THE 2ND SCREEN AS IS.**

CREATE REPORT

THE NUMBER OF ASSISTANCE RECORDS SHOULD MATCH THE NUMBER OF RECORDS YOU THOUGHT YOU ENTERED—THE NUMBER OF ASSISTANCE RECORDS IS THE NUMBER OF "BOXES" WE DISTRIBUTED THAT DAY.

Mt. Pleasant Food Pantry

Agency Assistance Report (page 1 of 1)

Report Filters

Include private records:	Yes
Date range:	May 01, 2011 to Jun 01, 2011

Report Summary

Total Assistance:	$ 0.00
Assistance Records:	10

Children (0 - 17) Assisted:	0
Adults (18 - 59) Assisted:	7
Seniors (60+) Assisted:	0
Other (unknown) Assisted:	1
Total Cases Assisted:	**8**

|	
Children (0 - 17) in Assisted Households:	8
Adults (18 - 59) in Assisted Households:	11
Seniors (60+) in Assisted Households:	2
Other (unknown) in Assisted Households:	4
Total Households Assisted:	**7 households with a total of 25 members**

Still doesn't match?

CAN YOU GET A printout OF A LIST OF THE CLIENTS WHO APPEAR IN A CERTAIN REPORT? Yes.

 Once you login, you click on **my agency** on the top right, and then the **reports** tab toward the middle-top of the page. From there you will select either Assistance, or Cases (Assistance to see who's received a box during a certain period of time, and Cases to see who all is in your system) from the options that appear. Then you will click either the List or CSV options on the top right of the next screen that appears (List will form a complete list of the data you want in a template form, while CSV is an excel file and will be emailed to you allowing you to manipulate it however you'd like). Next select the time frame that you want to see under the Entry Date function at the top of the page, and then all the subsequent information that you want in the report from the list on that screen and the next. Run a few to see what you need and what you don't. After you do that click view **report** on the bottom of the screen and Oasis Insight will either email you an excel file (CSV) with all the information you've selected, or the report will process and appear on the screen.

ANOTHER TYPE OF REPORT THAT COULD BE USEFUL IS THE CLIENT LIST REPORT
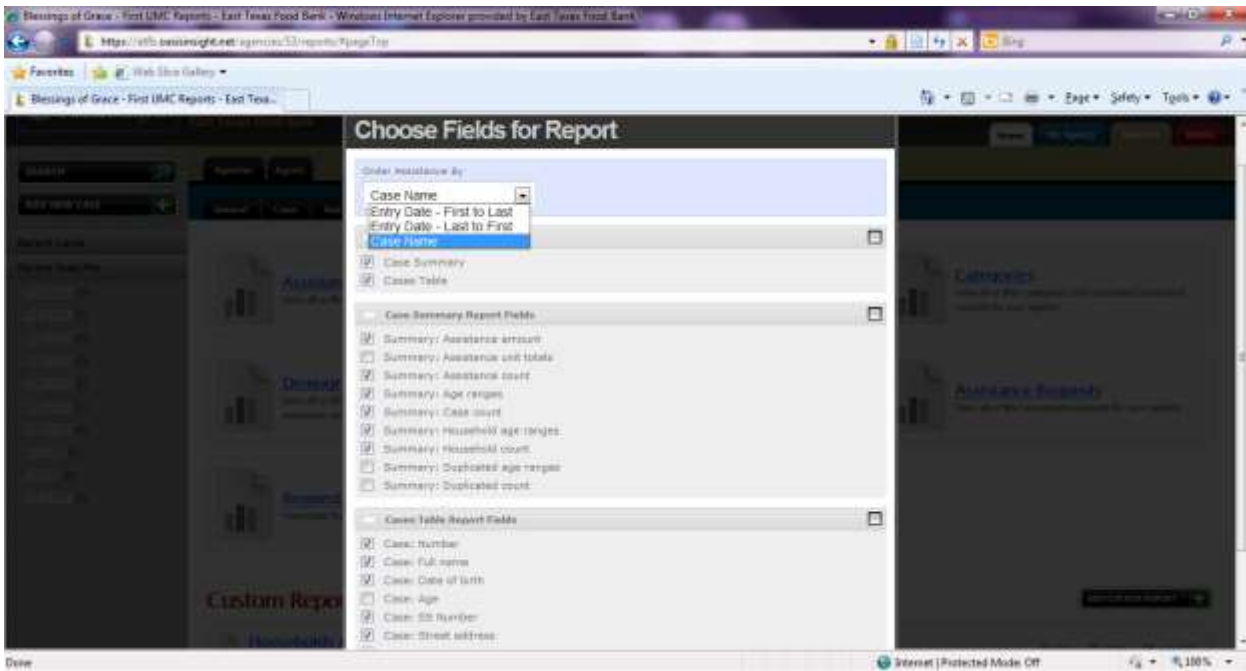
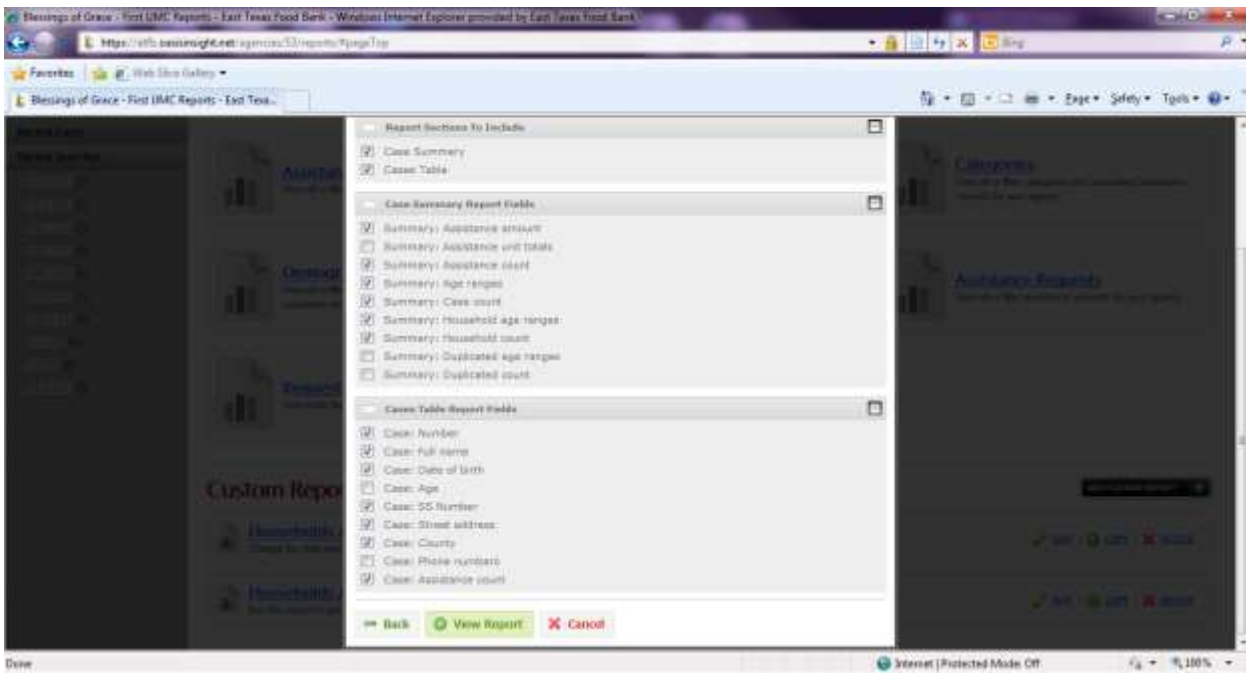CLICK ON "CASES"
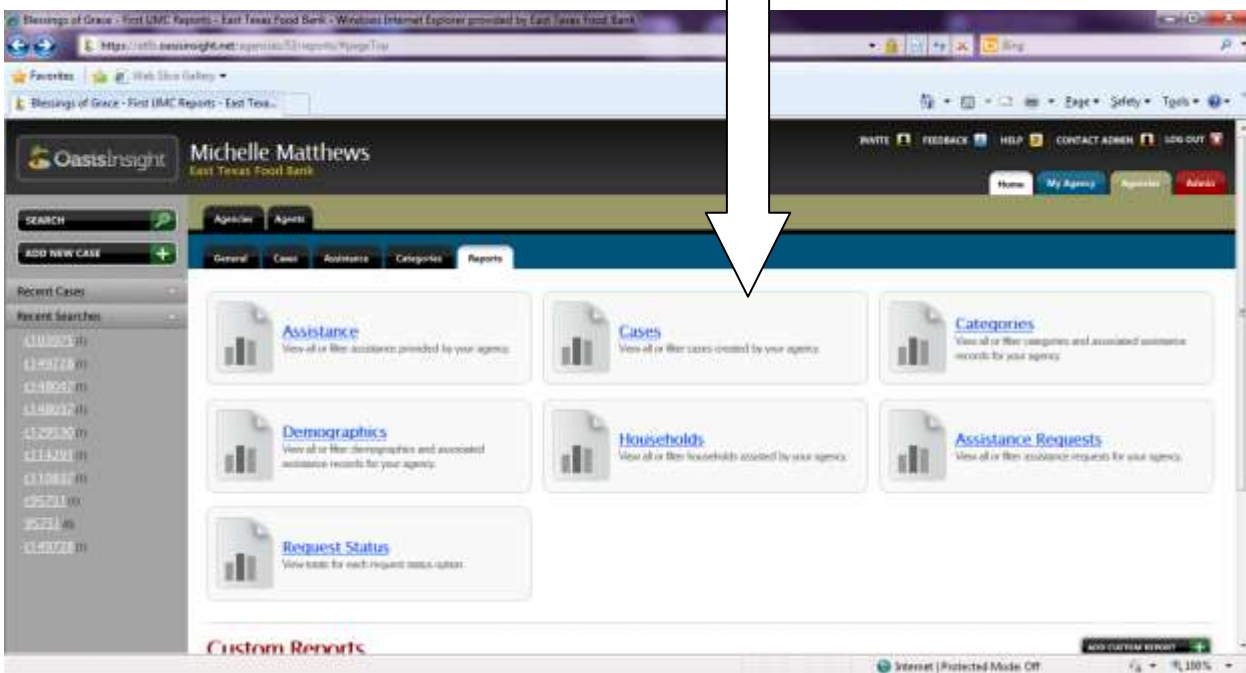
CHOOSE "TABLE" FORMAT
ENTER DATE OF SERVICE WHEN YOU BEGAN ENTERING DATA INTO THE SYSTEM TO TODAYS DATE
AT BOTTOM OF SCREEN "NEXT"

CHOOSE "CASE NAME" THIS WILL GIVE YOU ALL OF YOUR CLIENTS IN ALAPHETICAL ORDER

CLICK "VIEW REPORT" BUTTON AT THE BOTTOM OF THE SCREEN

IN A FEW MOMENTS YOUR REPORT WILL COME UP. (SEE NEXT PAGE)

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YOUR REPORT PROCESSES AND YOU CAN MAKE A COPY OF IT TO USE DURING YOUR PANTRY DAY.

THIS REPORT WILL ALLOW YOU TO HAVE THE CLIENT SIGN FOR THE FOOD, VERIFY THE INFORMATION, AND MAKE AN EASY DATA ENTRY SHEET FOR THOSE THAT HAVE TO DO DATA ENTRY AT A LATER DATE.

REMEMBER:

YOU CAN PLAY AROUND WITH THE REPORT FEATURE TO GET THE INFORMATION YOU NEED.