How to Run a Basic Report to find CSFP Errors

1. Login to Oasis Insight

2. Click on the "My Agency" tab (upper right hand in blue.)

3. Click on the "Reports" tab (upper left hand in black.)

4. Click on the "Assistance" icon with blue letters.

5. Select Format: List

6. Filter By Date of Assistance – click on the far right (+) to expand
    - Type the first day of the month through the last day of the month in question
        i.e. 09-01-2019   to   09-30-2019

7. Filter By Assistance Category– click on the far right (+) to expand
    - Select Food: CSFP-(CSFP Approved Agency Only)

8. Scroll to the very bottom and click "Next" (green letters)

9. Scroll to the very bottom of the next page and click "View Report" (green letters)

10. A report will generate and you can scroll through the report and verify each name against your CSFP sign sheet until you determine your errors.

11. If you wish you can run more detailed reports to help locate the errors. Feel free to play around with the various report formats and data selections for report generation.

12. These reports can be used for pantry as well. If you have any technical questions please contact: Oasis Insight at 888-764-0633.