

## Pre-Distribution Cheat Sheet

1. Reminder Phone calls: It's very important to complete annual validations over the phone if possible. Clients highlighted in yellow or orange are due for an AV (annual validation) Year 1 or Year 2.
  - a. If you get a client to answer the phone, ask them the 3 qualifying questions.
    - Has your address changed? Answer "No"
    - Do you want to continue in the program? Answer "Yes"
    - Has your income increased significantly in the past year? Answer "No" (No indicates that they still qualify for the program).
  - b. Write "NYY" in the signature column of the line containing the client who has completed their annual validation. This will save your distribution volunteers time and prevent them from asking the questions a second time during distribution.

## Post-Distribution Cheat Sheet

1. New Client Sign Ups: During your distribution you have completed applications for new clients and written their first & last name, birthdate, and "New Sign Up" (in the signature line) onto the blank lines provided at the bottom of your Waiting List. After your distribution you need to activate these clients in the Oasis database. Remember to add clients in the same order as they appear written in on your Waiting List. Here are the steps to follow:
  - a. Log into Oasis and search for the client's birthdate for an existing case number. Look for the name of your new applicant with the matching birthdate.
  - b. If you don't find the applicant using their birthdate, search by their first and last name. Some clients are in the database with a name but no birthday (If you do not find an existing case number, see step 1k below).
  - c. Once you've found the correct existing case, click on the client's name. The client's personal information page will open. Click on "edit case" (upper right hand corner.) The client's Household Information tab will open.
  - d. Update all lines in the household information tab according to the data collected on the new application.
    - To add proxy information, click "add phone number". E.g. Description = Proxy John Smith, Number = 903-555-1212.
    - If a proxy phone number is not provided, do not add the proxy to the database it will only appear on the paper application.
  - e. When all lines are updated click the forward arrow at the bottom of the screen, this will take you to the Eligibility tab.
  - f. In the eligibility tab, update the Total Income, Government Benefits, and Household Eligibility areas only. DO NOT UPDATE ANY OTHER AREAS IN THIS TAB. At the bottom of the screen, click the forward arrow. This will take you to the CSFP tab.
  - g. In the CSFP tab, using the drop down box under CSFP ONLY category, select "Waiting List". DO NOT UPDATE ANY OTHER AREAS OF THIS TAB. If there is already information in the CSFP tab, stop what you are doing and reach out to Michelle & Maureen with the case number. Information in this tab indicates that the client is already enrolled in the program at another site.
  - h. Scroll to the bottom of the screen and click "Save Changes".

- i. Click on the “Assistance” tab on the right side of the screen.
- j. Click “Add Request” on the right side of the screen. Enter the Amount (1), Category (CSFP), and Status (approved). If you are not adding the request on the same day as your distribution, post-date the “Date/Time” category back to the date of your distribution.
- k. Click “Add Request” at the bottom of the box to save. A yellow banner should appear.
- l. Write the case number at the top of the front page of the paper application.
- m. Write the case number next to the client name on the Waiting List from the distribution you’ve just completed.

## **2. If you serve Senior Grocery boxes**

- a. Search for the client using their birthday (collect this data during the distribution and write next to their name on the waiting list).
- b. Locate the correct client case number and write it in next to their name on the Waiting List, repeat the Add Assistance process – however you will select Category “Food: Senior Grocery Kit G005”.
  - If you do not find a case number in the database, you DO NOT need to add an assistance record for the Senior Grocery box.

## **3. Reconcile the tickets collected to the Notated List**

- a. Use the buddy system. Person 1 will read the name on ticket, Person 2 will highlight the case number (on the list) of the client whose name has just been read aloud. If needed, use a different color highlighter for the clients who received a Senior Grocery box.
- b. Once all clients served are highlighted on the list, count the total number of highlighted case numbers and write the total at the bottom of each page of your list (far left column on the list).
- c. Count all the records in the “Ticket #” column and write the total at the bottom of each page (far right column of the list).
- d. Verify that the count of case numbers from each page and the amount of ticket numbers match. If the numbers don’t match you need to trouble shoot. There is either a missing ticket, or a missing highlighted case number. Complete this process for both the Participating and Waiting Lists.

## **4. Highlight new data for Oasis update**

- a. For any client who completed an annual validation, highlight/circle/bold the signature line that was marked with “NYY”.
- b. For any client who gave a new phone number, highlight/circle/bold the phone number.
- c. For any client who is marked as “Deceased” or “Remove”, highlight/circle/bold the signature line.
- d. See #7 in this document.

## **5. Adding Multiple Assistance Records**

- a. Log into Oasis Insight.
- b. From the homepage, click on “My Agency” in the upper right hand corner.
- c. Click on the “Assistance” tab.
- d. Click on “Add multiple assistance” in the upper right hand corner.
- e. In the multiple assistance box that opens select the following:

- Amount = 1.
- Category = CSFP.
- Leave the day & time alone if you are entering data the same day as your distribution. If you are entering data any day after the distribution ends, enter the first day of the distribution. The time does not matter.
- Click on the box in the upper right corner that reads “Enter case #” and enter the case number of the first highlighted case on your participating list. Click “Add Case” or simply push enter. Continue entering case numbers until you are finished with both the Participating and Waiting List. **Do not include Senior Grocery case numbers.**
- E.g. enter case number 123456 and click add case, then enter case number 123457 and click add case. After entering all the case numbers, scroll down and click on “Add Assistance” in the lower left hand corner of the box.
- Use a buddy. Person 1 can read the case number from the list and write a check mark once the number is added, Person 2 can type the case numbers into Oasis.

#### 6. Run an Assistance Report

- Click on “My Agency”.
- Select “Reports”.
- Select “Assistance” in the upper left corner.
- Now you will need to assign filters to your report.
  - Click the plus (+) sign on the right corner of the first filter option “Filter By **Date of Assistance**”.
  - Enter the first day of the month of your distribution, and the last date of the month of your distribution. E.g. 08/01/2021 and 08/31/2021.
  - Click the plus (+) sign on the right corner of the eleventh filter option “Filter By **Assistance Category**”.
  - Select “Food: CSFP – (CSFP Approved Agency Only)”
- Once your filters are in place, scroll to the bottom of the box and click “Next”.
- Scroll to the bottom of the next box that appears and click “View Report”.
- Look for “**Total Cases Assisted:**”. The number should match the sum total of highlighted case numbers on both your Participating and Waiting Lists.

#### 7. Using the Lists to Update Oasis

- For clients with “NYY” highlighted on your list:
  - From the homepage of Oasis Insight, click the search tool and enter the client case number, open the case.
  - In the upper right corner click “EDIT CASE”.
  - Select the “CSFP” tab (3<sup>rd</sup> tab).
  - You will need to update either the Annual Validation Year 1 box (3<sup>rd</sup> box) or the Annual Validation Year 2 box (4<sup>th</sup> box), depending on what is written in the signature line of the lists. Select the month and year that the annual validation was completed. E.g. August 2021.
  - Scroll to the bottom of the screen and click “Save Changes”.
- For clients with a new phone number:

- From the homepage of Oasis Insight, click the search tool and enter the client case number, open the case.
- In the upper right corner click “EDIT CASE”.
- Select the “Household Information” tab (1<sup>st</sup> tab).
- Scroll down to the “Phone Numbers” category.
- If there is no number listed type “Main” into the description category, type the new phone number (E.g. 903 555 1212), scroll down and click save changes.
- If there is a number listed, click “Add Phone Number” copy the existing number into the empty box (lower box) then enter the new phone number in the box on top. Only the top box phone number can appear on your list.
- Scroll to the bottom of the screen and click “Save Changes”.

c. For clients who are deceased or request to be removed

- From the homepage of Oasis Insight, click the search tool and enter the client case number, open the case.
- In the upper right corner click “EDIT CASE”.
- Click on the CSFP tab (3<sup>rd</sup> tab).
- Flat line (- - - -) all drop down boxes.
- Scroll to the bottom of the screen and click “Save Changes”.
- On the right side of the screen click on “Assistance”.
- On the left side of the assistance screen look for the filter:

Show  assistance for...

Change the drop down to =>

- Scroll through the assistance records until you locate the **yellow** Assistance Request Banner. In the right corner of the banner, click delete. A box will appear asking if you want to delete the request, click Ok (**if there is no delete option, email the case number and the reason for removal to Michelle Rodriguez or Maureen Dobyns**).
- On the right side of the screen, click on “Notes”.
- In the upper right corner click on “ADD NOTE”.
- In the space provided, give the reason for removing the client from the program. E.g. “Client declared increased gross income and no longer qualifies for CSFP” or “Client is moving out of service area and requested to be removed” or “As of August 2021 Client is deceased”.
- Click “Add Note” at the bottom of the box.
- **If the client is deceased**- there is an additional step. On the right side of the screen click on “Personal Info”, click on “EDIT CASE”, in the “Household Information” tab check the box for “Deceased” located below the date of birth.

8. **Update Paper Applications with Annual Validations**

- a. Pull all the paper applications of clients on your lists that are marked “NYY”.
- b. For each client, complete page 3 of the application.

- c. Annual Validation Year 1 is the top half of page 3, Annual Validation Year 2 is the bottom half of page 3.
- On the first line (Participant's Name and Signature) print the client's first and last name followed by the phrase "per conversation". Current guidelines do not require a client signature, you are completing the validation verbally.
  - On the third line (Eligibility Specialist's Name and Signature), sign your name and today's date mm/dd/yyyy.
  - In the questions box mark #1 – No, #2 – Yes, #3 – Yes. #4 write the date range beginning with today's date and ending at the end of the current month one year in the future. E.g. **Dates of Annual Validation** 08/08/2021 to 08/31/2021.