

## Giving a CSFP Assistance Record in Paperless

\*Must use the **PLUS** Paperless Login for this process (ends with @etfb.org)

1. Open Client Case
2. Are there any banner messages for the client:
  - Attention: CSFP Formal Review Required – Complete a new application before serving.
  - Attention: CSFP New Formal review is needed! – Complete new 3-year application.
  - Attention: CSFP- Eligible on Wait List – Is it time to serve a wait list client?
  - Attention: CSFP-Eligible on Wait List “CSFP-Waitlist Expired –Needs new Formal Review” – Complete a new application prior to serving.
  - Attention – No signature(s) recorded – Capture the client or proxy signature.
3. Click on **BARCODE MODE** (Upper left under “Add New Case”)
  - Click – Barcode Mode
  - Verify Client name matches desired client for Assistance
  - Green banner – continue
  - Red banner – complete banner requirements prior to serving
  - Click - AVAILABLE BARCODES (Upper right of Barcode Mode window)
    - i. Click – CSFP – 1 Box
    - ii. Click - Confirm Assistance
    - iii. Click – Done
4. Return to the Agency Cases Barcode Roster report upper left of Oasis screen and assist the next client.
5. If unable to use the live assistance mode, you can mark your printed Paperless Barcode Roster and enter the records later using the “Add Multiple Assistance” tool.