Paperless Pre-during-post Distribution Procedures

Materials/Items Needed:

1. New Waiting Client Sheet available for documentation of new clients and clients not on list.
2. Run and print a copy of the Paperless Barcode Roster (selecting Senior Box Enrollment category)
   a. Run a combined Participating/Waiting or separate lists as preferred by site administrator.
3. Copies of Participants Rights and Responsibility / Written Notice of Beneficiary Rights available for new client sign ups or new three year renewal applications.
4. Monthly Distribution Reminder Slips and Waiting slips (Required for every distribution)
5. Tickets to document clients receiving a box and to exchange for the box received.
6. Something to place the ticket into (Plastic coffee can etc.)
7. At least two electronic devices recommended one for check in/assistance records/client updates and one for new client signup.
   (At least 1 device should be touchscreen capable for client signature captured at time of signup.)
8. Wi-Fi or Hot Spot available

Predistribution Procedures:

1. Call clients at least 2 days in advance using the call scripts provided by ETFB.
2. Create the Paperless Barcode Roster. You will receive an email letting you know the necessary changes have been made by ETFB Tyler office for your site client enrollment. (The roster should only be run after ETFB has made the necessary Client Status Changes dependent upon client monthly attendance.)
   a. Run the Paperless Barcode Roster
      i. Click on the blue "My Agency" tab
      ii. Click on the "Reports" tab
      iii. Click on the blue hyperlink "CSFP Paperless Barcode Roster"
      iv. Select "Show Cases **Assisted** By Your Agency"
      v. Select "Filter By **Assistance Category**"
         1. Benefits – Benefits: Senior Box Enrollment
      vi. Select "Filter By **Demographic Profile Match**"
         1. Click - **CSFP Site Agency for Client**
            a. Select your site name (only select your site name with DD after it if you are running a DoorDash Paperless Barcode Roster for your site's DoorDash clients.)
         2. Click – **CSFP Program Status**
            a. Select – Participating (Scroll down to the bottom)
         3. Click - "Next"
         4. Order By
            a. Case Name (this will alphabetize your Participating list.)
         5. Click View Report
         6. Print a copy of the report for a manual check to verify everything was entered correctly during the distribution.
         7. Repeat the above steps starting with **2a** to complete the Paperless Barcode Roster selecting "**Eligible on Wait List**".

Distribution Procedures:

1. Paperless Barcode Roster – use it to check in clients and give an assistance record. (If a client is not on the Paperless Barcode Roster an investigation must be done before, the client receives a box. You will need to search for them by their birthdate.)
2. Open the client's case by clicking the blue hyperlink.
   b. Complete any necessary updates as described in the client banner (red or green).
   c. Add client assistance record. Double check that it is the client's name before adding the assistance record.

       i. Click on the "Barcode Mode" in the top left. **BARCODE MODE** |||||
       ii. Click on the "Available Barcodes" button top right. **AVAILABLE BARCODES**

       iii. Click on the "CSFP – 1 Box" to give an assistance record. **CSFP - 1 Box**
       iv. CONFIRM ASSISTANCE – large green button bottom left.

   d. Reopen the Paperless Barcode Roster by clicking on the top left tab titled - "Agency Cases – CSFP Direct Sites".
   e. Repeat steps *a – c* above for each client assisted during the distribution.

Post Distribution Procedures:

1. Count any on hand CSFP boxes and cheese, make a note of the number of CSFP boxes, cheese, and Senior Grocery boxes (if any).
2. Using marked client roster, count the number of clients who received a CSFP box.
3. Add the number of boxes on hand from previous month (if any) to the number of boxes received. Then subtract the number of boxes on hand after the distribution. The resulting number is the total Assistance Records that should be recorded. For example:
   a. 7 (previous) + 65 (received) = 72 servable boxes. 72 (servable) – 3 (on hand after) = 69 Assistance Records.

Starting numbers:	7 (previous)	**End numbers**	72 (servable boxes)
	+ 65(received)		- 69 (assistance records)
	72 (servable boxes)		3 (on hand boxes not served)

4. Log into Oasis database
   a. Open a Chrome (or other) web browser. Go to www.easttexasfoodbank.org
   b. Click on "Partner Agencies".
   c. Click on "Oasis Insight" (in the upper right hand corner of the screen).
   d. In the dialog box that appears – first in the email section, enter your Paperless login email. For example - foodpantrycsfp@etfb.org – **THE SUFFIX SHOULD BE "etfb.org". It is very important <u>not to use an old email</u> address, always use the** PLUS **paperless login email that was assigned to your site.**
   e. In the password box enter **Change12***

5. Run an Assistance Report in Oasis to verify the # of assistance records recorded. After logging in, from the Home screen that appears:
   a. Select the "My Agency" tab.
   b. Select the "Reports" tab.
   c. Select "Assistance".
   d. Change format (1st line) to "Table"
   e. Under "Filter by Date of Assistance", enter the first and last day of the month of the distribution. For example 08-01-2022 and 08-31-2022.
   f. Under "Filter by Assistance Category" select Food: CSFP – (CSFP Approved Agency Only)
   g. Under "Filter by Demographic Profile Match", select "CSFP Site Agency for Client" check the box next to your pantry name. (Pantry name only if you are not a DoorDash site; if you are a DoorDash location you will also check your Pantry name with DD)
   h. Scroll to the bottom and click "Next".
   i. Under "Order Assistance by" (first line), select "Case Name"
   j. Scroll to the bottom and click "View Report"
   k. If your report shows the same number of boxes served (same as the answer to #3 earlier), then there is no need to continue with reconciliation. The records in Oasis will match exactly the CSFP boxes you have distributed.

6. If the number of assistance records in Oasis Assistance Report does not equal the number of boxes served (same as the answer to #3 earlier), then there are several ways to trouble shoot.
   a. Count the number of cases marked as receiving assistance on each page of the printed/marked paper Participating & Waiting lists. Add all the totals together, it should be the same as the number of CSFP boxes served (same as the answer to #3 earlier).
      1. If it does not match, you will need to find the missing client assistance record(s). Utilize the marked list, and client tickets to compare with the database. Start by highlighting the case # only in case you need to complete a second round of comparison. Mark the name the next time etc. as needed until the error is found.)
   b. Compare the marked list to the Assistance report from Oasis. Use the buddy system, one person reads person's name in the Assistance report, the other person checks that the list is marked. (If not marked mark the persons case number.)
   c. Once you have surmised who was marked on the list but not given an assistance record in Oasis, add their Assistance Records to the database or mark the list.
   d. To add multiple assistance records, from the home screen in Oasis (see #4 a-d), click My Agency tab, click the Assistance tab, and then click Add Multiple Assistance (upper right corner of the screen).

      1. In the dialog box that appears, enter in all the following categories:
         - Amount = 1
         - Unit = Box
         - Category = Food: CSFP - (CSFP Approved Agency Only)
         - Description = leave blank
         - Date/Time = mm/dd/yyyy of the distribution. For example 08/12/2022.
         - Funding Source = unspecified
      2. In the upper right corner of the dialog box, in the space that says Enter Case #, simply type in each case number that was missing from the Assistance Report. After each case number is typed, click "Enter".
      3. Once all the missing cases are added, click "Add Assistance" in the lower left corner of the box.
   e. Follow the instructions in #5 to run the Assistance Report again. This time your numbers should match the calculations from #3.

7. Check for any needed case updates. For any client who completed a new application, check the client case CSFP tabs, the Assistance tab, and the CSFP form.

   a. Open the client case – from the Oasis home page, click "Search" in the upper left corner. If not already in advanced search mode, click "Advanced Search" in the upper right corner.
      - In the Case ID box, enter the new client's case number => click search => click on the client's name.

   b. Check that the client's CSFP tabs have been updated (CSFP and CSFP Paperless). On the client's homepage, click the EDIT CASE button. Click the CSFP tab (third tab from the left). Here you are checking the top two lines of information.
      - <u>Brand new client</u>:
        o Marked as Waiting.
        o TYLER ETFB USE ONLY – Transferred To Paperless "Yes"
      - <u>Enrolled client</u>: new application, they will either be designated Participating or Waiting.
        o Participating clients should have the month and year in the second line of information under "Formal Review" (e.g. August 2022). Participating applications are good for three years.
        o Waiting clients will have no Formal Review. Waiting applications are good for 6 months unless they are moved to participating at which time it becomes a three-year application.
      - Click the CSFP Paperless tab (fourth/last tab).
        o <u>CSFP Site Agency for Client</u>: select your site from the drop down list if they are a DoorDash client choose your site name + DD.
        o <u>Program Status</u>: Participating or Eligible on Waitlist to match the client's status.
        o <u>Signup Date</u>: for existing Participating or Waiting clients do not change the date, for clients who have never been enrolled in CSFP you will enter the date they were approved.
      - Click Save Changes.

   c. On the RIGHT SIDE of the clients home screen, click the Assistance tab and verify:
      - <u>CSFP Assistance</u> for example pink banner
        o Received by **Barney Rubble** for **Food: CSFP- (CSFP Approved Agency Only)** if the client got a CSFP box.
      - <u>Assistance Request</u> for example yellow banner
        o Requested by **Barney Rubble** for **Food: CSFP- (CSFP Approved Agency Only)**

      - <u>Senior Box Enrollment</u> for example pink banner
        o Received by **Barney Rubble** for **Benefits: Senior Box Enrollment**
        o

   d. On the RIGHT SIDE of the client's home screen, click the CSFP tab. `CSFP`
      The screen that appears is the CSFP form this creates the printable CSFP application.

Check the CSFP summary (==Waiting Client==)

- **CSFP Site Agency for Client**
  ETFB Log Cabin Food Pantry
- **Client Phone Number**
  936-555-1234
- **Name of Proxy**
  Abe Lincoln
- **Proxy Phone Number**
  936-555-2345
- **Start Date of Proxy**   **End Date of Proxy**
  Oct 4, 2022   Oct 31, 2026
- **CSFP Program Status**
  ==Eligible on Wait List==
- **Signup Date (Date Placed on Waiting List)**
  Oct 4, 2022

Check the CSFP summary (==Participating Client==)

- **CSFP Site Agency for Client**
  ETFB Log Cabin Food Pantry
- **Client Phone Number**
  936-555-1234
- **Name of Proxy**
  Abe Lincoln
- **Proxy Phone Number**
  936-555-2345
- **Start Date of Proxy**   **End Date of Proxy**
  Oct 4, 2022   Oct 31, 2026
- **CSFP Program Status**
  ==Participating==
- **Signup Date (Date Placed on Waiting List)**
  Oct 4, 2022
- **Formal Review**
  Oct 4, 2022 **to** Oct 31, 2023

8. Once your distribution is over the last step is to report to ETFB the outcomes of your monthly distribution. <u>Due by the 3rd Friday of the month</u>.

   Instructions to complete CSFP Monthly Report:
   - Open a web browser. Go to www.easttexasfoodbank.org
   - Click on "Partner Agencies"
   - Click on "ETFB Reports" ⟹ "CSFP Monthly Report"
   - *Use your agency name, as it appears on your invoice. For example "Tyler Family Assistance". Select the name of the month completed.
   - Answer ALL questions – including those for Senior Grocery (kit G-005) and DoorDash whether or not your agency uses these items. Answer questions using the CSFP product invoice (what you received prior to distribution), on hand box count, and total clients served data gathered before and during the distribution.
   - Click "Submit".