



FOOD BANK
OF NORTHERN NEVADA

OASIS INSIGHTS
USER GUIDE

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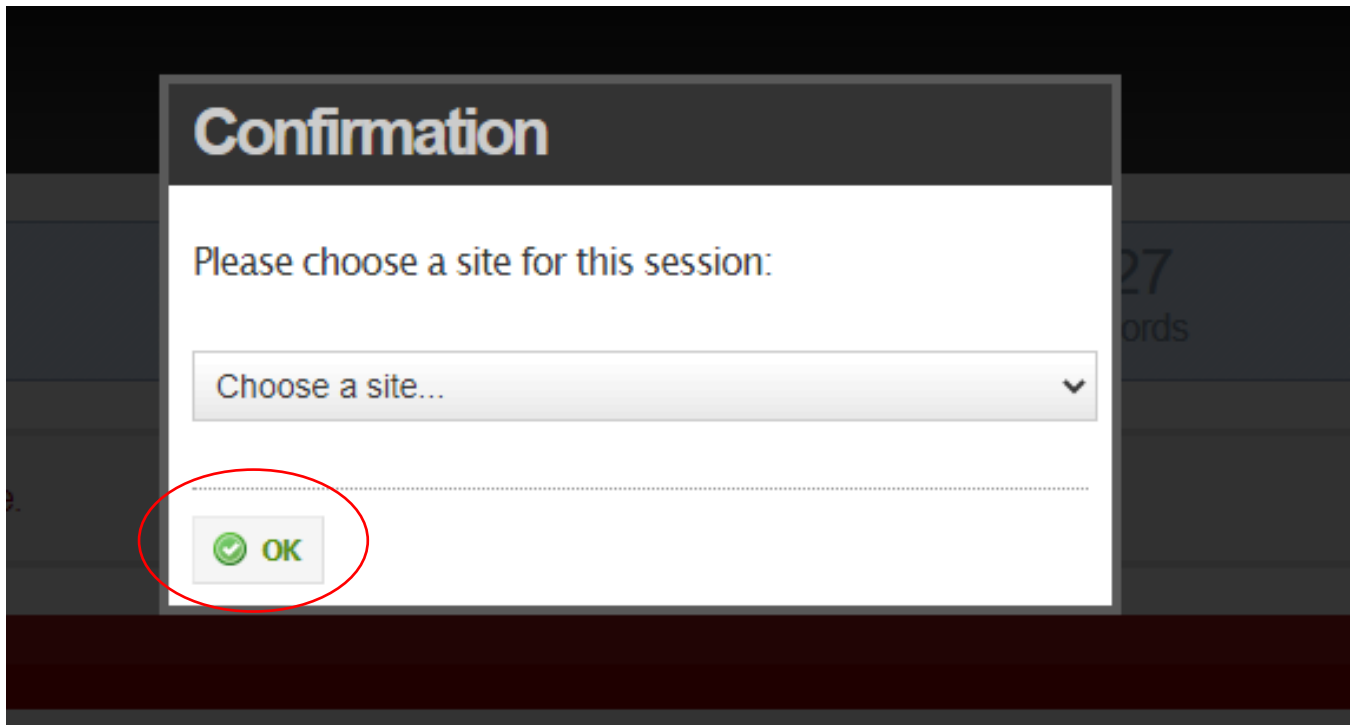
Introduction to Oasis

Oasis Insight is an online database used by thousands of food banks, food pantries, and other charitable institutions throughout the United States to keep client data in a safe and confidential manner. Rather than keeping individual spreadsheets, or even paper records that can be cumbersome to work with, every client's file and pantry report can be easily created, stored, and automatically backed up in Oasis. Once an agency is set up, maintaining client records, assistance counts, and monthly reports becomes an easy, routine process. Best of all, agencies within the Food Bank of Northern Nevada's network receive 100% free access, training, and ongoing technical support on Oasis as long as they remain FBNN partner agencies. All this makes client data entry and reporting much easier, freeing up every Oasis user's time and energy to do what matters most: helping to feed our communities.

Basic Functions

Signing In

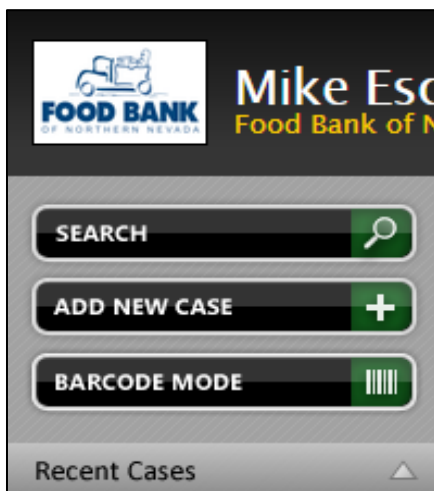
- Log onto Oasis (<https://fbnn.oasisinsight.net/>)
- The intro screen pops up with a site-selection menu window that looks like this. Do NOT enter any site – ignore this menu and navigate past it by clicking “OK.”
 - If you select an entry by mistake, simply log out of Oasis, log back in, and click “OK” without selecting a site.



You are now logged into Oasis.

Searching for Clients

- On the far left-hand side of the screen, click on the “Search” button



- ALWAYS** search a client by DATE OF BIRTH. Enter the client’s DOB, then click on the “SEARCH” button as pictured below.
 - Searching by DOB will pull up a list of all clients sharing that same DOB. A DOB search will yield quicker results than a name search, and it will also allow you to easily identify whether a client may have already been entered in the past under a misspelled name, different last name (for example, some Hispanic clients have two last names), etc. In short, a DOB search will better prevent you from accidentally creating duplicate entries.

A screenshot of a web-based 'Advanced Search' form. The form has several input fields: 'First name', 'Last name', 'Case ID', 'Date of birth (MM-DD-YYYY)', 'Address', 'City', 'State', 'Zip', 'Phone', 'Other ID', 'Email', and 'CSFP Program Status'. The 'Date of birth' field is circled in red. Below the form, there is a 'Search' button with a magnifying glass icon, also circled in red. At the bottom right, there is a checkbox labeled 'Only show HEAD OF HOUSEHOLD in search results.'

- This pulls up a list of all clients in Oasis who share a particular birthdate. You will see whether the client you are searching for exists.

- If they exist already, click on their name (in blue). From here, you may edit their information and add assistance records to their profile (see “Updating Profile Information on Existing Clients” and “Adding Assistance to Existing Clients”)

First name

Last name

Case ID

Date of birth (MM-DD-YYYY)

2 - 26 - 1972

Address

City

State

Zip

Phone

Other ID

Email

Search

☐ Only show HEAD OF HOUSEHOLD in search results.

[Chad Aldred](#)

165 Hubbard Way
Reno, NV 89502

DOB: Feb 26, 1972

Phone #: 775-200-2343
Other IDs: No Other IDs Provided

Email: No Email Provided

[BRANDI ARATA](#)

54600 NEIL RD #194
RENO, NV 89502

DOB: Feb 26, 1972

Phone #: 775-434-3580
Other IDs: No Other IDs Provided

Email: No Email Provided

[Roldofo Ceja Alvarez](#)

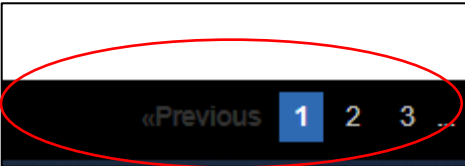
3508 Woodside Drive
Carson City, NV 89701

DOB: Feb 26, 1972

Phone: No Phone Provided
Other IDs: No Other IDs Provided

Email: No Email Provided

- **IMPORTANT:** Please note that Oasis only displays (10) client profiles per page. Every so often, there are more than (10) clients who share the same birthdate, so it is important that we scroll to the bottom of the page and see if there are multiple pages for us to look through BEFORE we assume a client doesn’t exist and create a new profile.



Creating a New Client Profile

- If you look for a client and they do NOT exist in Oasis already, you may create them from this same Search screen by clicking on the “Click here to create a case” link on the bottom of the screen. From here, you will be able to create a profile for the new client following the steps below (Updating/Creating Profile Information on Clients). These are essentially the same steps/menus you will see regardless of whether a client already exists in Oasis or if you are creating them from scratch.

Rebecca Foster		
No Address Provided	DOB: Feb 26, 1972	Phone #s: 775-508-1960
		Other IDs: CLIENT ID: 05-09-004
CSFP Program Status: Has Never Participated		CSFP Legacy Case ID: Other
Robert McConley		
Homeless	DOB: Feb 26, 1972	Phone #s: 775-000-0000
Reno, NV 89502		Other IDs: No Other IDs Provided
CSFP Program Status: None		CSFP Legacy Case ID: None
Don't see the case you're looking for? Click here to create a case from your search terms.		

Updating/Creating Profile Information on Clients

- Assuming a client you looked up in the previous step exists and you have selected them, you'll be taken to a screen that looks something like this. By default, Oasis will take you to the "Alerts" section of a client's profile, if there are any Alerts entered for that client. If there are not any Alerts entered for a client, you will be taken to the "Personal Info" section of their profile.

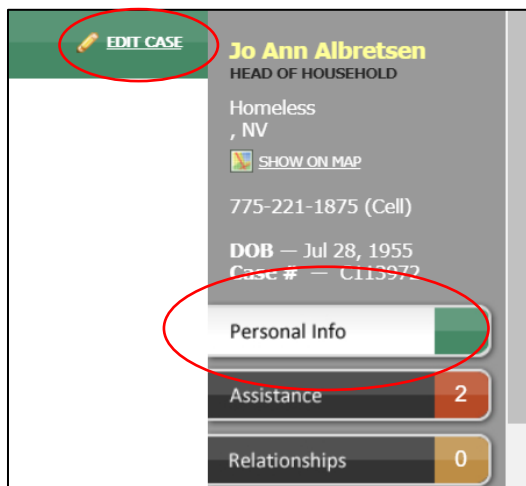
The screenshot shows the 'Alerts for Carmelo Alvarado' page. The left sidebar contains a search bar, 'ADD NEW CASE', 'BARCODE MODE', and lists of 'Recent Cases' and 'Recent Searches'. The main content area displays two alerts: one for Melissa Moreno (picked up food twice in the same week on 04/13/2020) and one for Marisol Martinez (updated 10/12/17). The right sidebar shows client details for Carmelo Alvarado, including address, DOB, and a list of metrics: Assistance (0), Relationships (5), Notes (0), Documents (0), Alerts (2), Applications (0), Appointments (0), and Assessments (0).

Sample: Client "Alerts" page

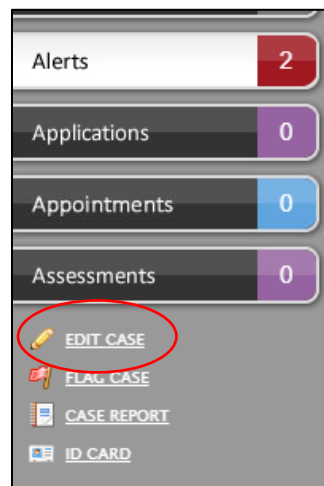
The screenshot shows the 'Personal Info for Carmelo Alvarado' page. The left sidebar is identical to the previous screenshot. The main content area displays personal information: Address (55050 Sun Flower Dr, Sun Valley, NV 89433), County (Washoe County), DOB (Jun 15, 1987 - 35 years old), Case # (C9102), and Phone (Not Provided). It also shows income and expense details, such as 'Income - Personal: Not Provided' and 'Income - Household: \$14,400 yr (\$1,200 mo - 38% poverty)'. A 'History of Modifications' section at the bottom lists changes made by Cindy Becher and Marisol Martinez. The right sidebar shows the same client details and metrics as the previous screenshot.

Sample: Client "Personal Info" page

- You will now edit the client's personal/demographic info. If you are already on the Personal Info page, you may click on "Edit Case" from the Personal Info page (Screenshot 1). If you are on any other page, like the Alerts page, you may click on the "Edit Case" link found on the right-hand menu below the tabs (Screenshot 2).



Screenshot 1



Screenshot 2

- This pulls up the below screen/set of options. Starting on the "Identification" tab, fill out/update all the provided information. **Be sure to scroll down all the way to the bottom to make sure you are entering all possible information!**
 - NOTE: For phone number, select "Other" from the "Description" pull-down menu

Add Case

Identification EFAP CSFP Income & Expenses Demographics Client Sites

First Name * Middle Name Last Name *

Date Of Birth (MM-DD-YYYY)
7 - 28 - 1955

☒ Head Of Household

Street Address

Address Apt #

City State Zip

County *

Mailing Address

Address Apt #

City State Zip

[COPY FROM STREET ADDRESS](#)

Phone Numbers

Description Number Ext.

[Add Phone Number](#)

Identification Numbers

Description Number

- Once you have entered all information on the “Identification” tab, select the “TEFAP” tab.
NOTE: Not all partners will have this tab in their view. If you do NOT have this tab, skip to the next step.
 - If a client has indicated they do NOT CURRENTLY receive SNAP (food stamp) benefits, select “AI.”
 - If a client has indicated they CURRENTLY receive SNAP benefits, select “PA.”

The screenshot shows the 'Add Case' form with the following elements:

- Title:** Add Case
- Tabs:** Identification, **TEFAP** (selected), CSFP, Income & Expenses, Demographics, Client Sites
- Section:** TEFAP Eligibility — Required
- Options:** ☒ AI, ☐ PA, ☐ Not Applicable
- Buttons:** + Add Case, X Cancel, and navigation arrows.

- Next, select the “Income & Expenses” tab.
 - In the “Name” pulldown menu, select “Other”
 - Type in the amount of income in the “Amount” box.
 - Select the appropriate interval (e.g. monthly, yearly, etc.).

Add Case

Identification

TEFAP

CSFP

Income & Expenses

Demographics

Client Sites

Income Sources

Name	Amount	Interval
<div></div>	<div></div>	<div></div>

[Add Income Source](#)

Expenses

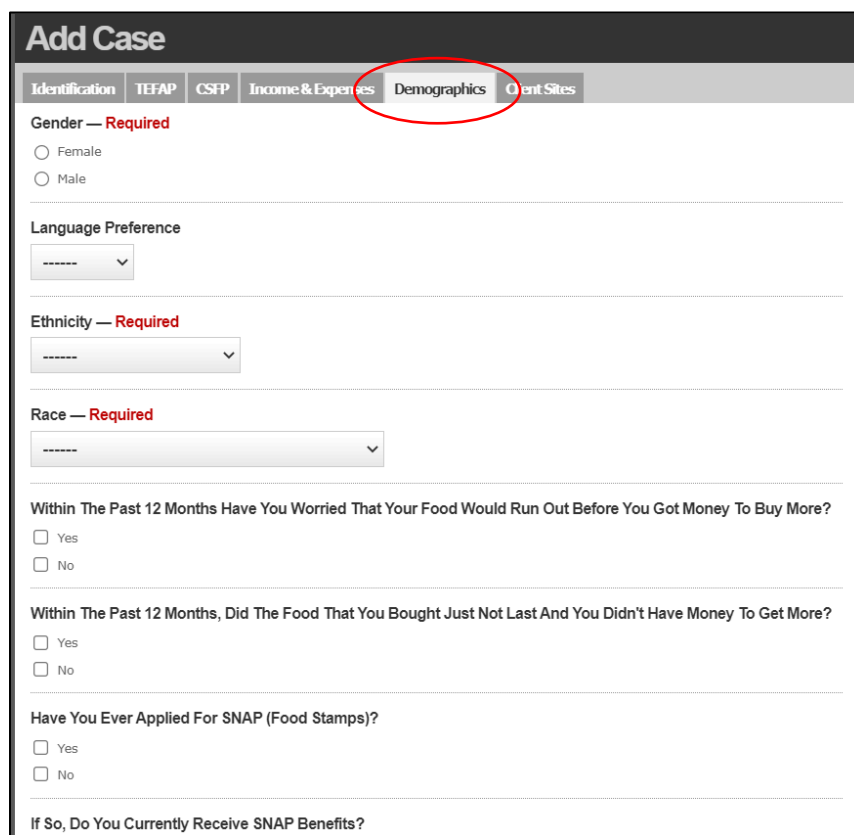
Name	Amount	Interval
<div></div>	<div></div>	<div></div>

[Add Expense](#)

Add Case

Cancel

- Next, click on the “Demographics” tab. Enter all the information as provided on the client’s intake form. Make sure you SCROLL DOWN all the way to the bottom of this menu to enter all the required prompts/questions.



Add Case

Identification TEFAP CSFP Income & Expenses **Demographics** Client Sites

Gender — Required

☐ Female

☐ Male

Language Preference

----- v

Ethnicity — Required

----- v

Race — Required

----- v

Within The Past 12 Months Have You Worried That Your Food Would Run Out Before You Got Money To Buy More?

☐ Yes

☐ No

Within The Past 12 Months, Did The Food That You Bought Just Not Last And You Didn't Have Money To Get More?

☐ Yes

☐ No

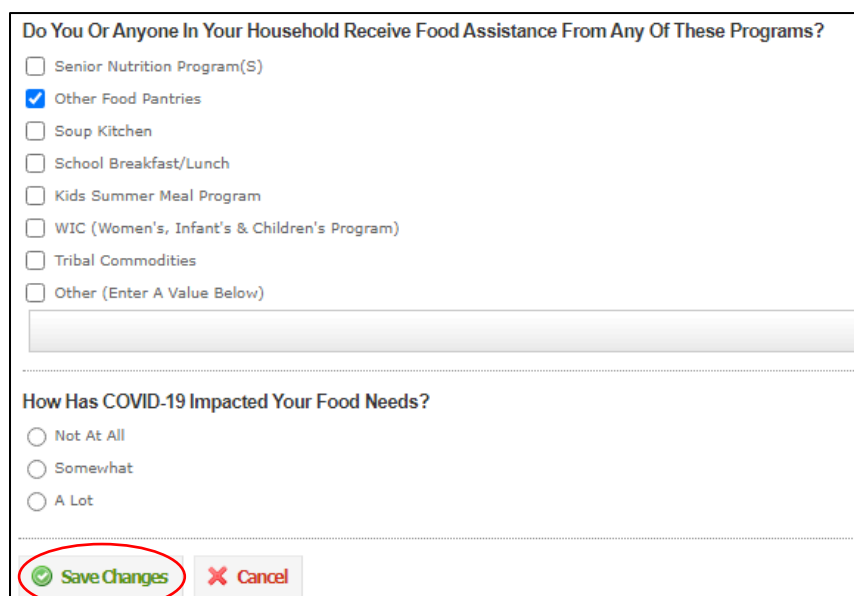
Have You Ever Applied For SNAP (Food Stamps)?

☐ Yes

☐ No

If So, Do You Currently Receive SNAP Benefits?

- Finally, scroll all the way to the bottom of the **site roster list** and click “Save Changes” if you are updating an existing client).



Do You Or Anyone In Your Household Receive Food Assistance From Any Of These Programs?

☐ Senior Nutrition Program(S)

☒ Other Food Pantries

☐ Soup Kitchen

☐ School Breakfast/Lunch

☐ Kids Summer Meal Program

☐ WIC (Women's, Infant's & Children's Program)

☐ Tribal Commodities

☐ Other (Enter A Value Below)

How Has COVID-19 Impacted Your Food Needs?

☐ Not At All

☐ Somewhat

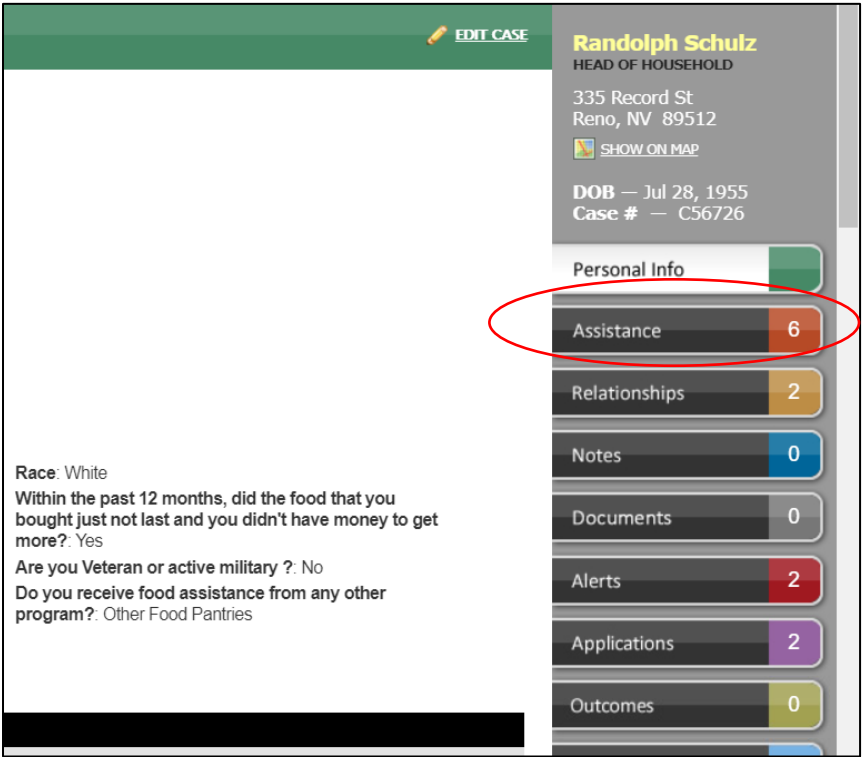
☐ A Lot

☒ **Save Changes**

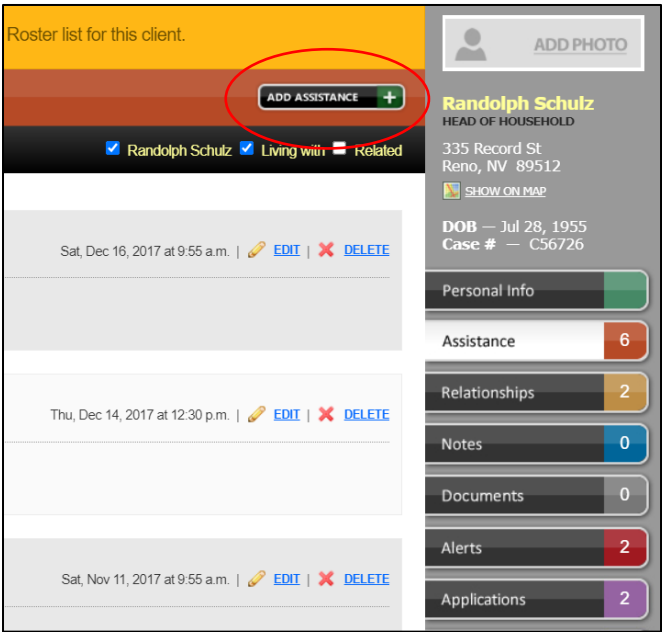
Adding Assistance to Client Records

Once you are on a client's page, you will be able to add Assistance records to this client as follows.

- Click the “Assistance” button on the right-hand side of the screen.



- Once on the Assistance screen, click on the “Add Assistance” button toward the upper right-hand side of the screen.



- This brings up the below screen. Click the arrow on the “Category” pull-down menu and scroll down until you see the type of assistance (See the [Types of Assistance](#) section for more information) you want to add to this client’s record. In most cases, it will be the “Food Pantry” category, but in other cases, you will want to add other and/or additional categories. We will discuss later on in this guide how to do this.
- Leave the “Amount” as 1.00 and the “Unit” as whatever it is listed as for the category you choose. Even if a client receives multiple boxes/bags, it is still only one pantry visit, hence we leave things as 1.00.

Add Assistance

Be sure to verify this is the correct case for **David Dunn** using a form of identification.

Amount: **1.00** Unit: **Boxes/Bags**

Category: **Food Pantry**

Manage Categories

- Carson Tahoe Health: Cancer Resource Center
- Carson Tahoe Health: Carbohydrate Controlled
- Carson Tahoe Health: Heart Healthy
- Carson Valley Medical Ctr: Additional Food
- Carson Valley Medical Ctr: Carbohydrate Controlled
- Carson Valley Medical Ctr: Heart Healthy
- Christmas Holiday Groceries
- Community Health Alliance : Additional Food
- Community Health Alliance: Carbohydrate Controlled
- Community Health Alliance: Heart Healthy
- Door Dash home delivery
- EFAP
- FBNN - CSFP Box
- FBNN - CSFP Verbal Recert
- FBNN - Help and Aid food box
- FBNN - Mobile Harvest
- FBNN - PRACTICE ONLY
- FBNN - Senior Box
- FBNN - TEFAP
- Food Pantry**

Visible to: **All Agencies**

Add **Save & Add another** **Cancel**

- Next, check what DATE the client received this assistance (do not worry about changing the time, only the DATE). By default, Oasis will pick today's date/time, which should be fine most of the time. Be sure that you are changing this ONLY as needed, which should only be the case if you are entering client assistance AFTER a distribution has taken place.
 - If the client ONLY received one type of assistance (e.g. "Food Pantry"), select the appropriate food category from the pulldown menu. Then, hit "Add" at the bottom of the menu.
 - If they ALSO received another type of assistance (e.g. TEFAP, etc.) along with their first type of food that day, select "Save and Add Another," then move to the next step.

Add Assistance

Be sure to verify this is the correct case for **David Dunn** using a form of identification.

Amount * Unit

Category [Manage Categories](#)

Site

Description

Date / Time (MM-DD-YYYY) - - :

ATTACH A FILE

No file chosen

Visible to

- For clients who ALSO received an additional form of assistance on the same pantry visit/food distribution (e.g. TEFAP assistance), select the appropriate category from the “Category” pull-down menu. IF NECESSARY, change the assistance date. Then, select “Add.” The client will now have both X and Y types of assistances received on the correct date if you did everything right.

BE SURE TO VERIFY THIS IS THE CORRECT CASE FOR
Randolph Schulz using a form of identification.

Amount * Unit

Category [Manage Categories](#)

- Community Healty Alliance: Carbohydrate Controlled
- Community Healty Alliance: Heart Healthy
- EFAP
- FBNN - CSFP Box
- FBNN - CSFP Verbal Recert
- FBNN - Help and Aid food box
- FBNN - Mobile Harvest
- FBNN - PRACTICE ONLY
- FBNN - Senior Box
- FBNN - TEFAP**
- Food Pantry
- Food Stamps
- Food Stamps & Medical
- Golden Groceries
- Holiday Basket
- Mobile Pantry
- N.N. Hopes: Additional Food
- N.N. Hopes: Carbohydrate Controlled
- N.N. Hopes: Heart Healthy
- Produce on Wheels

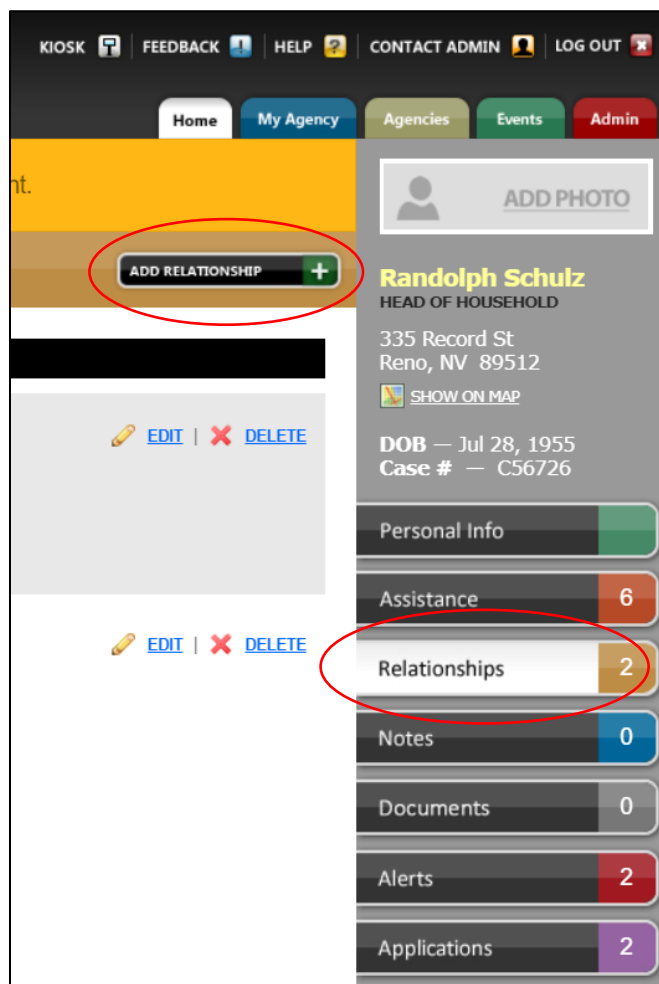
ATTACH A FILE

No file chosen

Visible to

Adding/Deleting Relationships

- Add Relationships to any client's profile by clicking the "Relationships" button on the right-hand side of the screen. This pulls up a menu where you will be able to add Family/Household members who live with this client.
 - NOTE: If you have a client who lives by themselves, you may skip this section entirely.
- Once in the "Relationships" section, select "Add Relationship."



- The below menu appears. Enter all the household members' information. If you need to add more household members, select “Add Another Household Member” toward the bottom of the screen.
 - Once you have added all relationships, select “Save Household Members.”

Add Household Members / Relationships

First Name *
Middle Name
Last Name *
Suffix
Date Of Birth
Gender *
Ethnicity *
Race *
Relationship To Randolph Schulz

First Name *
Middle Name
Last Name *
Suffix
Date Of Birth
Gender *
Ethnicity *
Race *
Relationship To Randolph Schulz

First Name *
Middle Name
Last Name *
Suffix
Date Of Birth
Gender *
Ethnicity *
Race *
Relationship To Randolph Schulz

[Add Another Household Member](#)
[Save Household Members](#) [Cancel](#) [Search for Existing Case](#)

- Sometimes, we need to REMOVE relationships from a household for any number of reasons (someone moved out, passed away, etc.). To do this, navigate to the “Relationships” tab, find the relationship you

Home My Agency

Relationships with Susan Villanueva

ADD RELATIONSHIP +

Living with Susan Villanueva

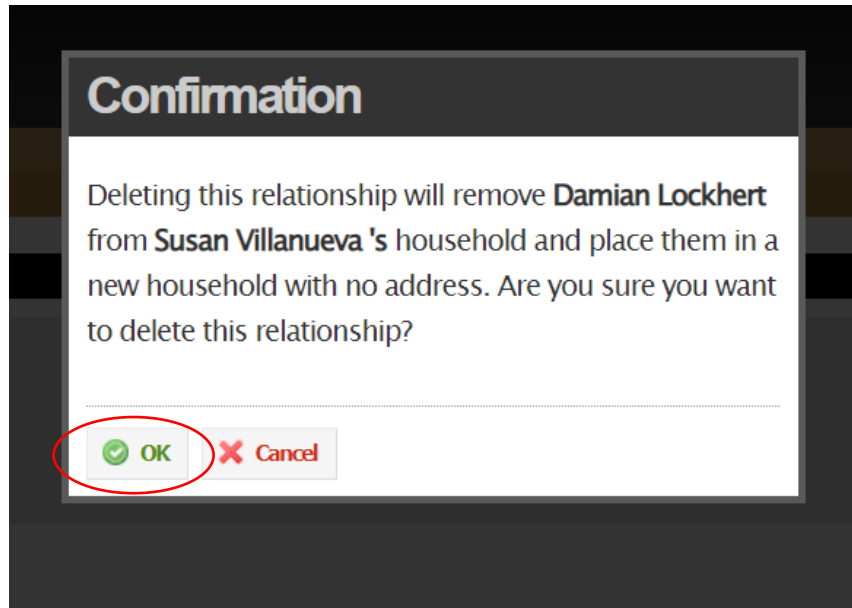
[Damian Lockhart](#) — Dependant

DOB: April 20, 2000 — 22 years old

Details: Gender: Male
Ethnicity: Not Hispanic or Latino
Race: White

[EDIT](#) [DELETE](#)

- Click the “OK” button on the window that appears to remove that relationship from a client’s household.



Types of Assistance

Disclaimer: If you have not yet, please review [Basic Functions](#), focusing on [Adding Assistance to Client Records](#) before proceeding to this section of the Oasis Manual.

Oasis allows users to track many different programs that are offered at their pantry. This guide will describe the different assistances and when you use them.

Food Pantry

- As stated in the [Adding Assistance to Client Records](#) section above, this is the assistance type that will be most used when adding assistance to a client profile. This is used anytime you are providing services to a client during pantry operations. ***More assistances can be added to this time of service but Food Pantry should always be your start.***
 - Now that Food Pantry has been added we can follow the steps outlined in the [Adding Assistance to Client Records](#) section to continue to add other assistances.

Add Assistance

Be sure to verify this is the correct case for **David Dunn** using a form of identification.

Amount ^{**} Unit

Category [Manage Categories](#)

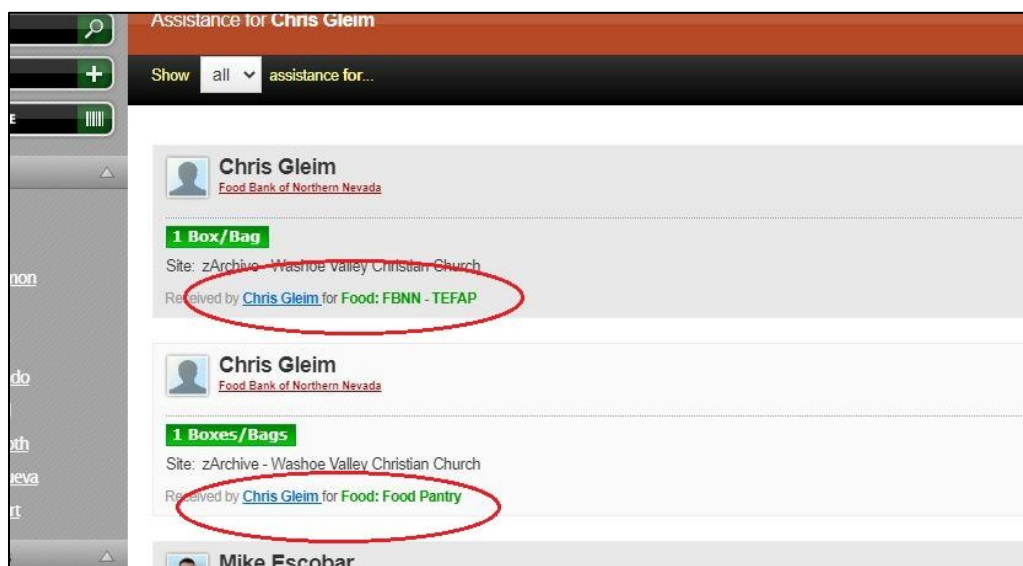
Food Pantry

- Carson Tahoe Health: Cancer Resource Center
- Carson Tahoe Health: Carbohydrate Controlled
- Carson Tahoe Health: Heart Healthy
- Carson Valley Medical Ctr: Additional Food
- Carson Valley Medical Ctr: Carbohydrate Controlled
- Carson Valley Medical Ctr: Heart Healthy
- Christmas Holiday Groceries
- Community Health Alliance : Additional Food
- Community Health Alliance: Carbohydrate Controlled
- Community Health Alliance: Heart Healthy
- Door Dash home delivery
- EFAP
- FBNN - CSFP Box
- FBNN - CSFP Verbal Recert
- FBNN - Help and Aid food box
- FBNN - Mobile Harvest
- FBNN - PRACTICE ONLY
- FBNN - Senior Box
- FBNN - TEFAP
- Food Pantry**

Visible to

TEFAP

- TEFAP or The Emergency Food Assistance Program is a federally funded program that many of our pantries provide for clients. If your pantry has TEFAP commodities available, both Food Pantry and FBNN – TEFAP assistance needs to be added to the client's assistance profile.
 - Once you have added and submitted both assistances, each will display in the client profiles assistance page.
 - Reminder: If your pantry has other programs (e.g. Rx Pantry, Golden Groceries) add these assistances as well.



Rx Pantry

Rx Pantry is a program where clients are provided a prescription from a physician that is redeemed at select pantries. There are multiple locations where these prescriptions are given and three types of Rx assistances (Additional Food, Heart Healthy, and Carbohydrate Controlled). When adding assistance, you will need to locate where the client received their prescription, as well as which of the three Rx categories it is for.

- Possible Rx Locations
 - Care Chest
 - Carson Tahoe Health
 - Carson Valley Medical Ctr
 - Community Health Alliance
 - N.N. Hopes (Northern Nevada Hopes)
 - Renown
 - UNR Student
 - VA Clinic
 - Washoe Tribe Health Clinic
 - WRPT Health Clinic
- Note: All clients are welcome to Rx Pantry food, but only clients who have the prescription should have this assistance added to their profile.
- Reminder: If your pantry has other programs (e.g. TEFAP, Golden Groceries) add these assistances as well.

Add Assistance

Be sure to verify this is the correct case for **Chris Gleim** using a form of identification.

Amount * Unit

Category [Manage Categories](#)

Smart Shopper #8

Food

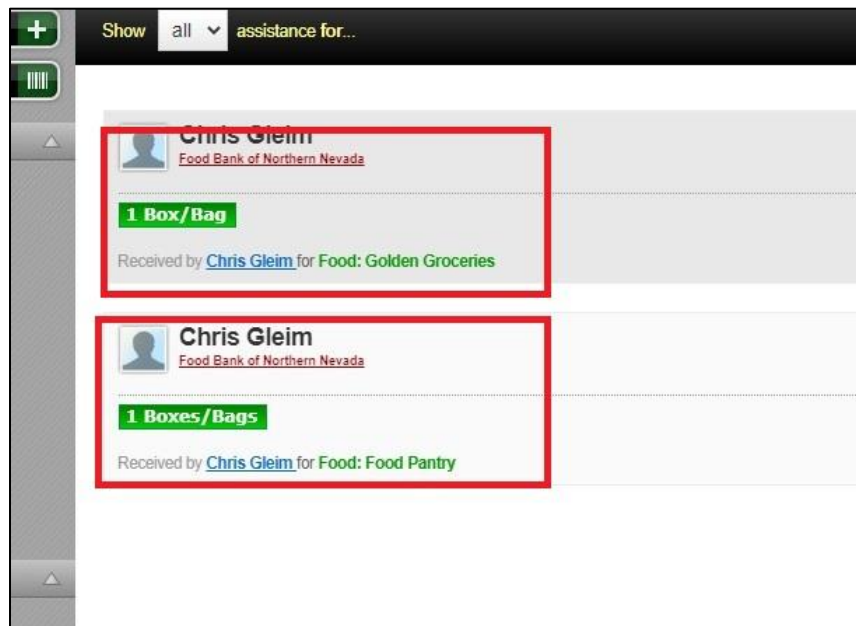
- Care Chest: Additional Food
- Care Chest: Heart Healthy
- Care Chest: Carbohydrate Controlled
- Carson Tahoe Health: Additional Food
- Carson Tahoe Health: Cancer Resource Center
- Carson Tahoe Health: Carbohydrate Controlled
- Carson Tahoe Health: Heart Healthy
- Carson Valley Medical Ctr: Additional Food
- Carson Valley Medical Ctr: Carbohydrate Controlled
- Carson Valley Medical Ctr: Heart Healthy
- Christmas Holiday Groceries
- Community Health Alliance : Additional Food
- Community Health Alliance: Carbohydrate Controlled
- Community Health Alliance: Heart Healthy
- Door Dash home delivery
- EFAP
- FBNN - CSFP Box
- FBNN - CSFP Verbal Recert**

Visible to

Golden Groceries

Golden Groceries is a program that focuses on providing extra Senior-specific times when they can receive food, as well as additional food items. If your pantry has Golden Groceries available, both Food Pantry and Golden Groceries assistance types need to be added to the client's profile.

- Once you have added and submitted both assistance types, each will display in the client profile's assistance page.
- Reminder: If your pantry has other programs (e.g. TEFAP, Rx Pantry) add these assistances as well.



Other Functions

Adding Notes/Alerts to Client Records

Oasis allows you to make notes on client records that may be included in two different sections. These notes and alerts are visible to ALL Oasis users in the network, so it is important that nothing confidential or insensitive is posted on here. Instead, use notes and alerts to post information about a client that is good to be reminded of anytime staff log on and view a client's record. This might include reminders to obtain or update information, behavior/conduct issues that resulted in a suspension of services, etc.

Generally, you want to use the NOTES function to include less important information that you wish to communicate but that is not necessarily overly timely, essential, etc. You will want to use ALERTS to communicate very important information that you want people to see easily. By default, Oasis takes you to a client's ALERTS page if any alerts have been entered on that profile, so it's the first thing everyone will see when they view any given client.

Adding Notes to a Client Record

- Click on the "Notes" tab on the right side of the screen while on a client's profile.
- Once in the "Notes" section of a client profile, click the "add note" button.

ADD NOTE +

✓ Susan Villanueva ✓ Living with Related

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.

Susan Villanueva
HEAD OF HOUSEHOLD
4000 Granite Way
Wellington, NV 89444
[SHOW ON MAP](#)
775-980-9190 (Other)
DOB — Nov 14, 1961
Case # — C224434
TEFAP Eligibility — AI

Personal Info

Assistance 1

Relationships 1

Notes 0

Documents 0

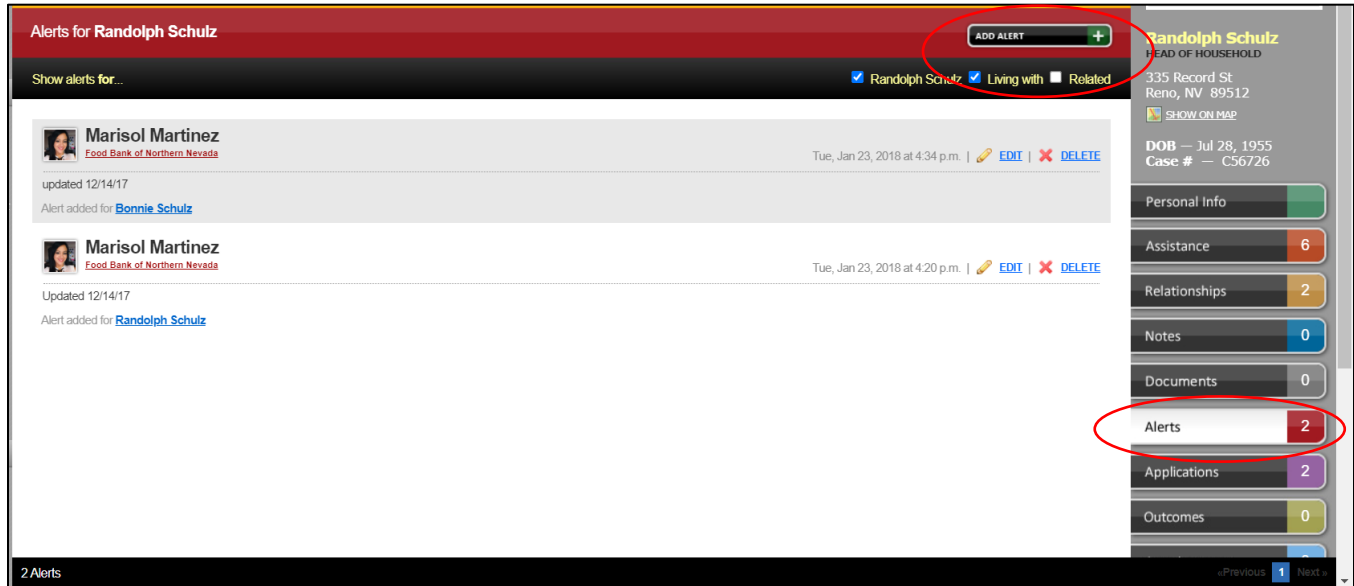
Alerts 1

- Type in whatever you wish to appear as the Note. Remember, these Notes are visible to any FBNN Oasis user, so be sure that you are keeping your statements specific but professional.

The screenshot shows a modal window titled "Add Note". At the top, the title "Add Note" is displayed in a large, bold, white font on a dark background. Below the title, the label "Description" is followed by a red asterisk, indicating a required field. A large, empty text area with a thin black border is provided for the user to enter the note's content. Below the text area, the text "Edit Date/Time" is shown in blue, followed by a horizontal line and the timestamp "Sep 12, 2022 at 11:33 a.m.". A section titled "ATTACH A FILE" in white text on a blue background contains a "Choose File" button and the text "No file chosen". Below this, a red-bordered section labeled "Visible to" contains a dropdown menu currently set to "All Agencies" and a yellow padlock icon, indicating that the visibility is locked. At the bottom of the dialog, there are two buttons: a green "Add Note" button with a plus icon and a grey "Cancel" button with a red X icon.

Adding Alerts to a Client Record

- Navigate to the Alerts screen by hitting the “Alerts” button on the right-hand side of the screen. This will take you to a screen that looks similar to the below example.
- Select “Add Alert” toward the top of the screen.



- Type in whatever you wish to appear as the Alert. Remember, these Alerts will generally be the FIRST thing any Oasis user sees when they pull up a client’s profile, so be sure that you are keeping your statement specific but professional.

Add Alert

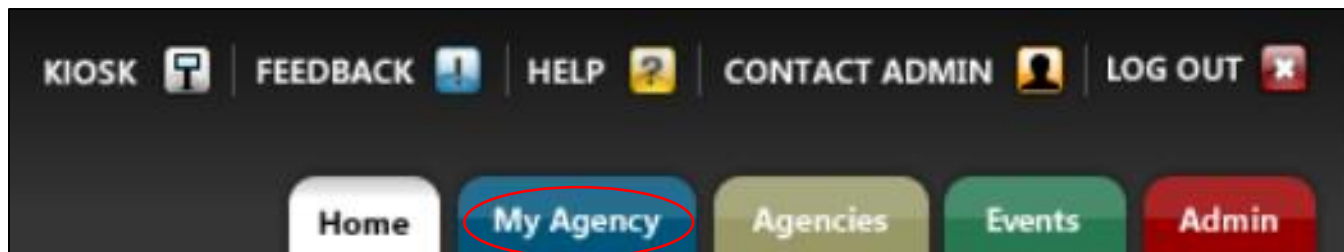
Description *

☐ Send email alert to all agencies?

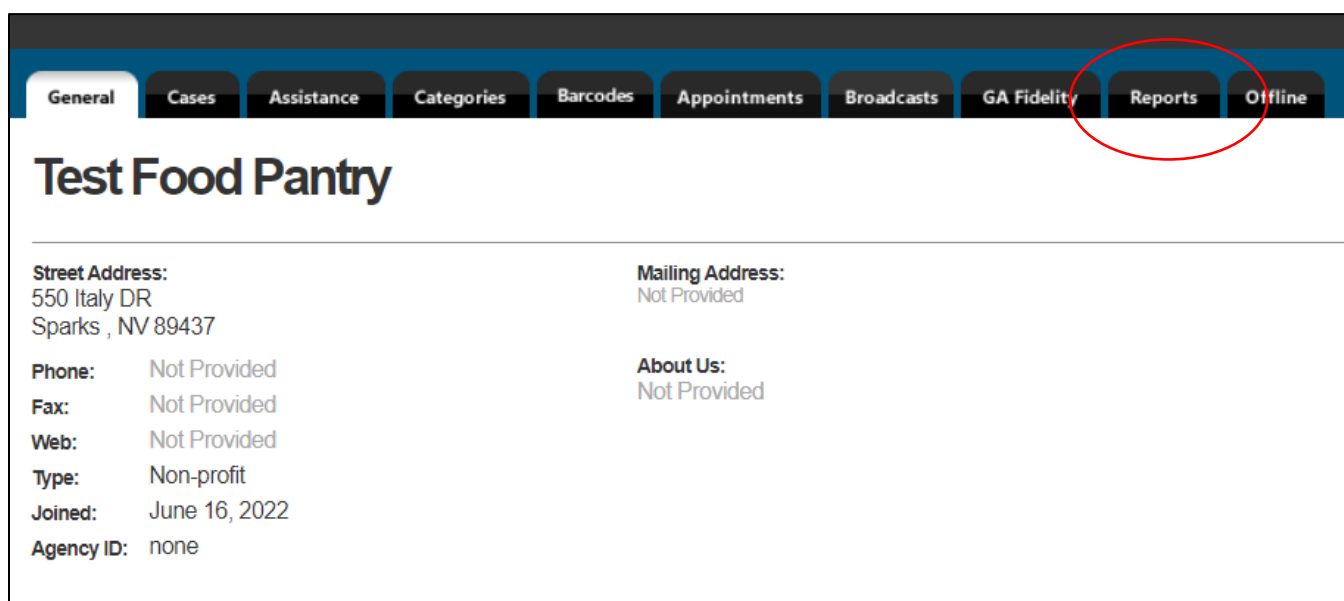
➕ Add Alert
✕ Cancel

Creating/Printing a Roster of Clients from your Agency (Entering Assistance while OFFLINE)

- Once you've logged into Oasis, click on the "My Agency" tab in the upper right corner of your screen.



- Click on the "Reports" tab



- Click on "Cases" menu. This will allow you to create a roster of all the people your agency has assisted.



- The following menu opens up. Make sure all appropriate areas are selected as pictured below
 - Check “Include Private Assistance in Total”
 - Select “Show Cases ASSISTED by your Agency (if you select “Created”, the system will generate a much smaller, incomplete list)
 - Select “Custom” as your format

Choose Filters for Cases Report

☒ Include **Private** Assistance In Totals **Format:** ☐ List ☐ Table ☐ CSV ☒ Custom

☐ Show Cases **Created** By Your Agency

☒ Show Cases **Assisted** By Your Agency

Filter By **Date Of Assistance** (Skip To Include All)

Filter By **Number Of Times Assisted** (Skip To Include All)

Filter By **Amount Of Assistance** (Skip To Include All)

- Click “Next”

Include **Private** Assistance In Totals

☐ Show Cases **Created** By Your Agency

☒ Show Cases **Assisted** By Your Agency

Filter By **Date Of Assistance** (Skip To Include All)

Filter By **Number Of Times Assisted** (Skip To Include All)

Filter By **Amount Of Assistance** (Skip To Include All)

Filter By **Household Yearly Income** (Skip To Include All)

Filter By **Percentage Of Poverty Level** (Skip To Include All)

Filter By **Age** (Skip To Include All)

Filter By **Household Size** (Skip To Include All)

Filter By **Household** (Skip To Include All)

Filter By **Funding Source** (Skip To Include All)

Filter By **Assistance Category** (Skip To Include All)

Filter By **Demographic Profile Match** (Skip To Include All)

Filter By **Zip Code** (Skip To Include All)

Filter By **County** (Skip To Include All)

Filter By **Agent** (Skip To Include All)

➡ Next ✕ Cancel

- When the following menu opens up, open up the first dropdown menu and select “Case Name.”
- Then, open up the second dropdown menu and select “Custom Cases Report – PDF”
- Finally, hit “View Report.” You will be asking Oasis to create a report that contains ALL the cases your agency has assisted, and to sort these in alphabetical order.

Choose Fields for Report

Order By

Case Name ▼

Custom Template

Custom Cases Report - PDF ▼

← Back ✓ View Report ✕ Cancel

Households
View all or filter households assisted by your agency.

- The following screen will open up after some time. LEFT click on the blue link to open up the roster



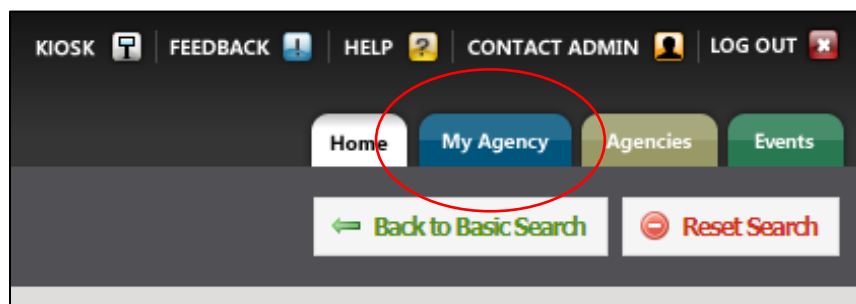
- Once you left click, a report that looks something like the following will open up. This is the list of all clients your agency has ever assisted. From here, you can download the roster and save it somewhere on your computer by clicking on the “arrow” icon (first icon inside the red circle below), or you can PRINT the roster by clicking on the printer icon (second icon inside the red circle below).
 - If you opt to print it, this paper roster can now be used to quickly check clients into a distribution where you do NOT have computer/internet access. You would simply put a checkmark on the printed roster next to the names of existing clients who see you at the food distribution, and you would then input this assistance into Oasis at a later date when you’re back on a computer (see the next section, “Inputting Multiple Client Assistance Records”).
 - If a client who is NOT on this paper roster drops in to see you at the food distribution, you know that they are a NEW client, and thus you can sign them up on the spot using whatever paper intake form/process your agency uses. This new client may then also be created onto Oasis when you get back on a computer.

ID	Last Name	First Name	Date of Birth	Street Address	Phone Number
35056	Aguilar	Dulce	04/09/1983	296 Gerdes Ave, Sun Valley, NV 894	775-354-5116
54471	Aguilar	Eva	06/03/1964	322 W. 5th Ave., Sun Valley, NV 894	775-502-2538
195669	Albin	Robert	11/24/1963	8845 Silver Dawn Ct., Ren o, NV 895	775-502-2018
155446	Alexander	Dawn	02/01/1970	5910 Calico Dr., Sun Valley, NV 894	775-771-2641
217675	ALIVIZO LOPEZ AMPARO			5343 SLOPE DR, SUN VALLEY, NV	
166511	Allen	Jacque	03/03/1952	525 Aloha Way, Sun Valley, NV 89433	775-674-8760
29115	Anderson	Lesa	11/20/1962	, NV	
93970	Aquino	Jocelyn	04/22/1969	439 Nevada St #1, Reno, NV 89503	775-470-3025
16311	ARATA	BRANDI	02/26/1972	54600 NEIL RD #194, RENO, NV 8950275	434-3580
195786	Arellanes	Nancy	12/30/1993	2150 Sutro St. #E1, Reno, NV 89512	775-313-2474
48178	Avila	Maria	10/02/1979	6405 W Ottawa Ct, Reno, nv 89434	775-636-2447
65677	Baber	Delona	07/06/1967	605 S 21 St., Sparks, NV 89431	775-420-2934
8942	Barajas	Blanca	05/09/1986	355 Maria CT, Sun Valley, NV 89433	775-203-5120
195880	Barajas	Christopher	05/19/1987	5312 Slope Drive, Sun Valley, NV 89	775-440-4316
198600	Barba	Jose	12/12/1963	1024 Prater, Sparks, NV 89421	775-247-2456
15645	Bekes	Constance	11/27/1960	5791 Apricot ct, Sun Valley, NV 894	775-842-7017

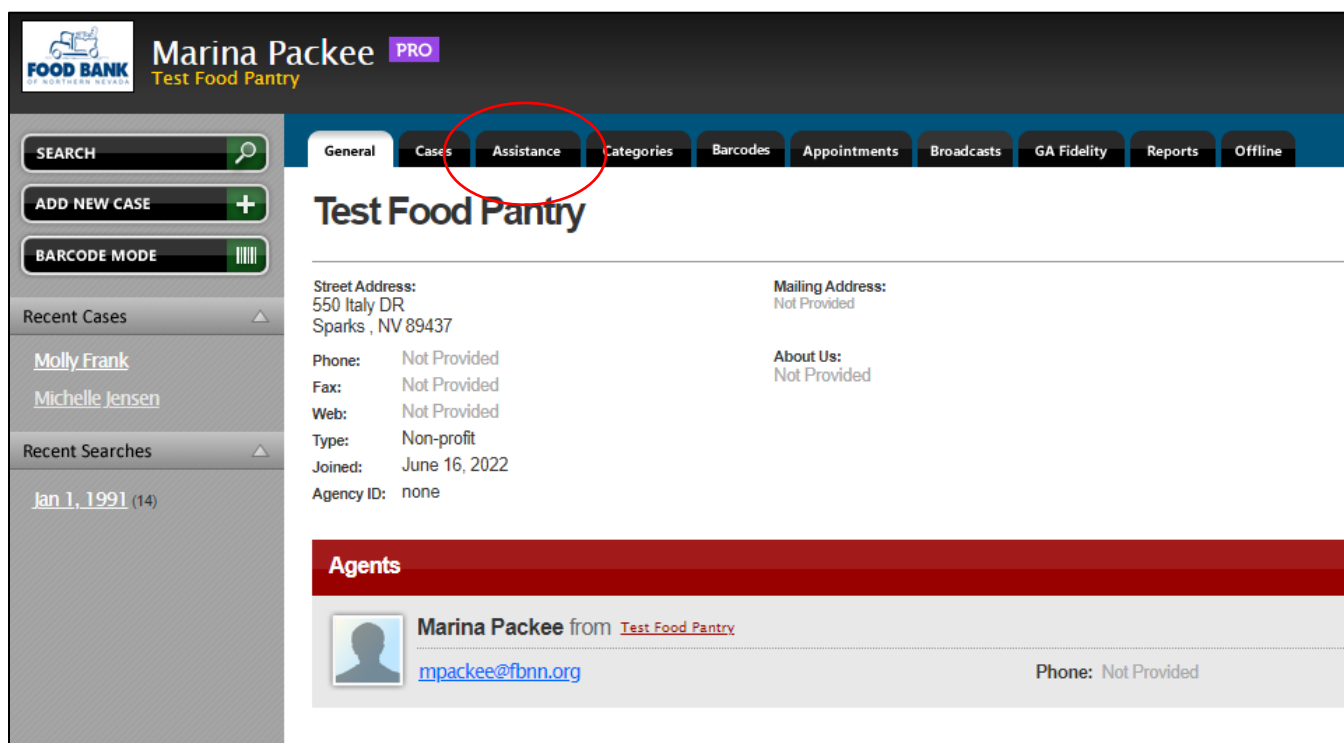
Inputting Multiple Client Assistance Records

Oasis allows users to input assistance for multiple clients at a time. This is particularly useful if you checked clients in using a paper roster (see “Creating/Printing a Roster of Clients from your Agency”) and are now ready to input their assistance into Oasis.

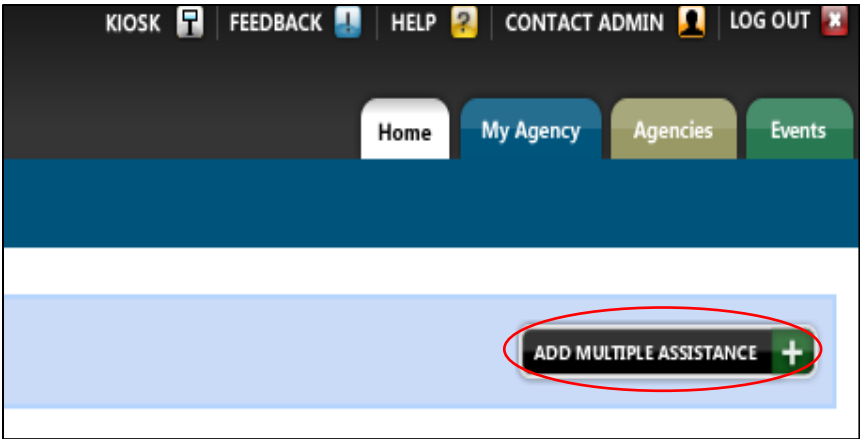
- Log into Oasis as usual
- Click on the “My Agency” tab in the upper right corner of your screen



- Click on the “Assistance” tab in the menu that has now opened up



- In the screen that opens up, click on the “Add Multiple Assistance” button toward the right side of your screen.



- The below menu opens up, and it is here that you can begin entering assistance for all of your clients. Here, we will tell Oasis what clients received what kinds of assistance, and on which day.

A screenshot of a web form titled "Add Multiple Assistance". The form is divided into several sections. On the left, there are input fields for "Amount" (set to 1.00), "Unit" (set to Box/Bag), "Category" (set to Food Pantry), "Site", and "Description". Below these is a "Date / Time" field set to 9 - 2 - 2022, 2 : 25 PM. At the bottom left, there is a "Visible to" dropdown menu set to "All Agencies". On the right side of the form, there is a green box titled "Add this assistance to the following cases:" containing an "Enter Case #" input field and an "Add Case" button. At the bottom of the form, there are two buttons: "Add Assistance" and "Cancel".

- As a general rule, each client will receive ONE unit of a certain type of assistance. In the below example, we are preparing to add one unit of food pantry assistance (1 box/bag) for each client we served. This is our way of telling Oasis that the client visited our food pantry once on this date, regardless of how many bags/boxes of food they actually received.
 - Make sure that you change the circled fields to reflect that types/amount of assistance you want to give each client.

Add Multiple Assistance

Amount: 1.00 Unit: Box/Bag

Category: Food Pantry

Date / Time (MM-DD-YYYY): 9 - 2 - 2022 2 : 25 PM

Visible to: All Agencies

[Add Case](#)

[Add Assistance](#) [Cancel](#)

- Now, change the DATE to the day/month/year that the client received assistance. Do not worry about changing time – only date.

Date / Time (MM-DD-YYYY): 9 - 2 - 2022 2 : 25 PM

Visible to: All Agencies

[Add Assistance](#) [Cancel](#)

- Now you are ready to begin telling Oasis WHO received assistance on those days. You will do so by entering the appropriate CASE NUMBERS for the clients who received assistance in the pictured field. Remember that you can obtain these case numbers from your printed client roster.

The screenshot shows the 'Add Multiple Assistance' form. The form includes fields for Amount (1.00), Unit (Box/Bag), Category (Food Pantry), Site, Description, Date / Time (9 - 2 - 2022, 25, PM), and Visible to (All Agencies). A red circle highlights the 'Add Case' section, which contains the text 'Add this assistance to the following cases:', an input field labeled 'Enter Case #', and an 'Add Case' button.

- Type in the first client's case number, then hit the "Add Case" button. Continue doing so until all clients who received assistance on that day are included in the list.

Note: If you make a mistake and add an incorrect client, click the "red X" picture next to each client's name to remove them from the list.

The screenshot shows the 'Add Multiple Assistance' form. On the right side, there is a green box titled 'Add this assistance to the following cases:'. Inside this box, there is an 'Enter Case #' input field and an 'Add Case' button. Below these, two cases are listed: 'C8965 — Jeanne Abuhend' and 'C1548 — Diana Damell'. Each case has a red 'X' icon to its right, indicating it can be removed. A red circle highlights the entire green box area.

- When you are finished adding all clients, click the "Add Assistance" button at the bottom of the window. This will prompt Oasis to enter your chosen assistance type for each selected client on the date you specified.

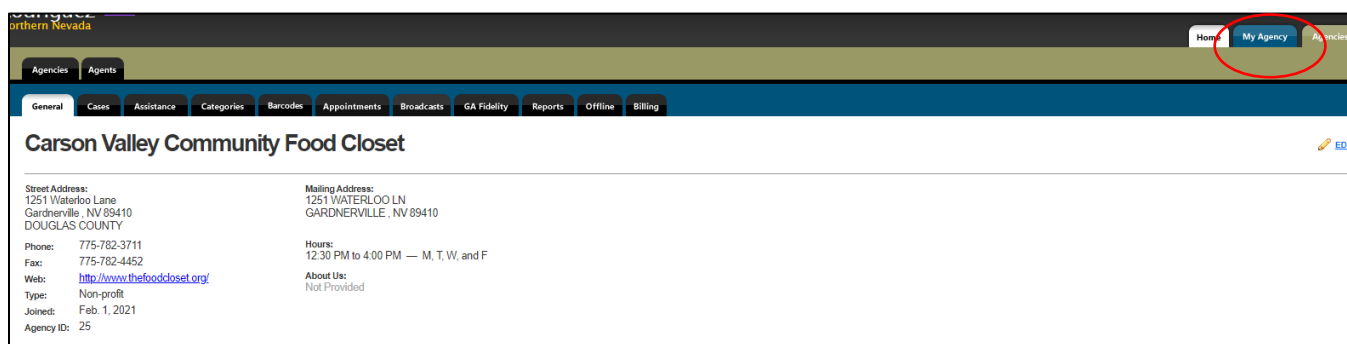
This screenshot shows the same 'Add Multiple Assistance' form. In this view, a red circle highlights the 'Add Assistance' button at the bottom left of the form, next to the 'Cancel' button. The rest of the form, including the case list on the right, remains the same as in the previous screenshot.

Running Reports

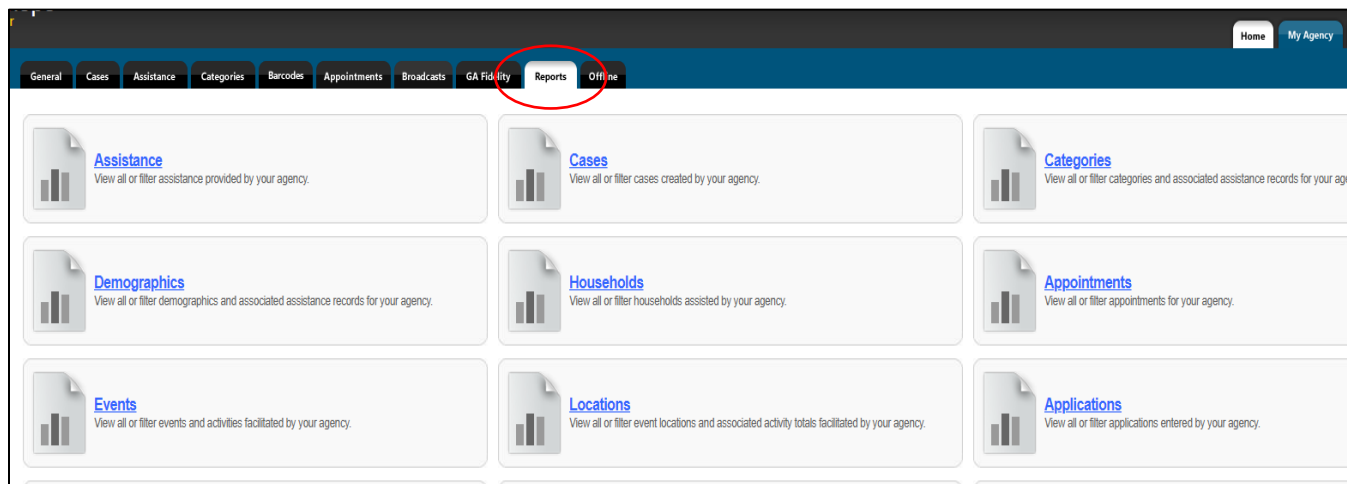
Once you sign up under the FBNN “umbrella” as a partner agency who uses Oasis, we create a variety of report templates that easily allow you to look up all kinds of data. This includes categories like how many clients received certain types of food assistance at your location last month, what individual demographic categories (e.g. race, ethnicity, income levels, families with and without kids, etc.) visited your location during a given time frame, what income brackets clients fall into, and what clients visited your pantry more than once on any given month.

Essentially, any data FBNN asks you to report to us can be easily obtained using the Reports features in Oasis and the templates we create for you upon signing up!

- Click on “My Agency” tab.



- Click on “Reports” Subtab.



- Scroll down until you see the “Saved Reports” section of this screen. Here, you’ll find all the report templates FBNN staff have created for you. Note that below EACH report, you’ll see we’ve included brief instructions to ONLY change the date when you run these reports. We have configured all other settings for you – all you need to do is change the date!
- Hit the “Edit” button next to the type of report you wish to run. For this example, we’ll run your “Monthly Report” (first option). This contains most of the data you will need to provide FBNN, including how many total clients and households you served, along with most of their basic demographics data (ages, sexes, races/ethnicities).

Saved Reports

ADD REPORT +

Monthly Reports

Just change the date

EDIT COPY DELETE

3 assistance per month

Just change the date

EDIT COPY DELETE

2 assistance per month

Just change the date

EDIT COPY DELETE

1 assistance a month

Just change the date

EDIT COPY DELETE

Income Extremely Low

Just change the date

EDIT COPY DELETE

Income Low

Just change the date

EDIT COPY DELETE

Income Very Low

Just change the date

EDIT COPY DELETE

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- The below window appears. Hit “Save and Continue.” Note that you are once again being reminded to ONLY change the date on the following report!

Add Report

Name *
Monthly Reports

Description
Just change the date

Report Type
Assistance

⇒ **Save & Continue** ✕ **Cancel**

- The below screen appears. Change ONLY the date range you are looking to obtain, and then hit “Save and Continue.”

☒ Include **Private** Assistance Format: ☒ List ☐ Table ☐ CSV ☐ Custom

Filter By **Date Of Assistance** (Skip To Include All)

Start Date (MM-DD-YYYY) End Date (MM-DD-YYYY)
11 - 1 - 2022 to **11 - 30 - 2022**

☐ Only include cases assisted for the first time since start date

Filter By **Number Of Times Assisted** (Skip To Include All)

Filter By **Amount Of Assistance** (Skip To Include All)

Filter By **Household Yearly Income** (Skip To Include All)

Filter By **Percentage Of Poverty Level** (Skip To Include All)

Filter By **Age** (Skip To Include All)

Filter By **Household Size** (Skip To Include All)

Filter By **Household** (Skip To Include All)

Filter By **Funding Source** (Skip To Include All)

Filter By **Assistance Category** (Skip To Include All)

Filter By **Other Assistance Fields** (Skip To Include All)

Filter By **Demographic Profile Match** (Skip To Include All)

Filter By **Zip Code** (Skip To Include All)

Filter By **County** (Skip To Include All)

Filter By **Agent** (Skip To Include All)

⇐ **Back** ⇒ **Save & Continue** ✕ **Cancel**

- The below screen appears. All the appropriate categories have already been prechecked for you, so do not make any changes. Hit “Save and Continue.”

Choose Fields for Monthly Reports

Order Assistance By

Oldest to Newest ▾

Report Sections To Include

☒ Report Filters

☒ Assistance Summary

☐ Assistance Record

Assistance Summary Report Fields

☐ Summary: Assistance amount

☐ Summary: Assistance unit totals

☐ Summary: Assistance count

☐ Summary: Demographic totals (Gender, Ethnicity, Race)

☐ Summary: Age ranges

☐ Summary: Case count

☒ Summary: New case count

☒ Summary: Household demographic totals (Gender, Ethnicity, Race)

☒ Summary: Household age ranges

☒ Summary: Household count

☒ Summary: New household count

☐ Summary: Duplicated demographic totals (Gender, Ethnicity, Race)

☐ Summary: Duplicated age ranges

☐ Summary: Duplicated count

← Back

✓ Save & View Report

✓ Save & Close

✗ Cancel

- The report on the LEFT side of the below picture is the Agency Assistance Report that Oasis generates based on what you just did. You may copy the data from this report into the monthly Excel spreadsheet (right image) that you submit to FBNN. Most of the demographic data FBNN asks you to report out will be found here.

Monthly Report
Carson Valley Community Food Closet Agency Assistance Report (page 1 of 6)

Report Filters
 Include private records: Yes
 Date range: Jul 01, 2022 to Jul 31, 2022
 Categories: Food: Food Pantry, Food: Weekly Food Pantry

Report Summary

Assisted Household Members by Gender:
 Female: 294
 Male: 220

Assisted Household Members by TEFAP Eligibility:
 All: 363
 PA: 36
 Not Applicable: 21

Assisted Household Members by Ethnicity:
 Hispanic or Latino: 70
 Not Hispanic or Latino: 428

Assisted Household Members by Race:
 American Indian or Alaska Native: 16
 Asian: 3
 Black or African American: 6
 Pacific Islander or Native Hawaiian: 6
 White: 470
 Other: 8

Children (0 - 5) in Assisted Households: 32
 Children (6 - 18) in Assisted Households: 90
 Children (6 - 17) in Assisted Households: 61
 Adults (19 - 59) in Assisted Households: 154
 Seniors (60+) in Assisted Households: 263
 Other (unknown) in Assisted Households: 4
Total Households Assisted: 40
New households Assisted: 40 households with a total of 314 members

Make sure you're on the correct day

Gender of Participants

**Age of participants
Choose children 0-18**

Ethnicity of Participants

Household and total count members

New/Unduplicated participants will be the New Household Assisted Number

Page 1

Please complete all Highlighted areas

Report Month: Jul-22 Agency Name: Carson Valley Community Food Closet
 State of Service: NV County of Service: Douglas City of Service: Douglas
 Report Prepared by: Sarah Sanchez Phone #: 775-782-9711

In the following section, please report by NUMBER OF PEOPLE (NOT check marks or percentages.) Individual categories below must equal the total number of participants for the entire month.

State-County-City for residence of participants (indicate with numbers)

State	County	City	Count
NV	Douglas		511

Total: 511

Gender of participants:
 Male: 294 Female: 220 Unknown: 0 Totals: 511

Age of participants:
 Age 0-18: 90 age 19-59: 154 Age 60+: 263 Unknown: 4 Match: 511

Ethnicity of participants:
 American: 6 Hispanic: 70 n: 16 Match: 511

Length of residence of participants:
 Under 1 Month: 0 1-24 Mos: 0 2 Years+: 0 Transien: 0
 Unknown: 511 Total can go on the UNKNOWN For Length of Residence: 511

Income level of participants:
 Extremely low: 0 Very Low: 0 Low: 0 Unknown: 0 Match: 0

Total number of new, unduplicated participants served this month: 74

- Once you have obtained and copied the necessary information, press the “Go Back” button on the top left corner of the report screen on Oasis. This will take you back to your Reports home page.

- Once back on the Reports home page, you may run reports for the remaining data you still need to obtain. The “Monthly Reports” template will give you much of the data you will need to send to FBNN, but there are some items related to client Income Levels and how often clients visit your pantry that will NOT be found in this report.

The monthly Excel spreadsheet also contains a second/back page. Here, you will include how many clients received assistance at your establishment 1, 2, 3, 4, or 5 times per month. You will learn how to obtain this information in the next step.

Pantry Services:				***A***		***B***	
1) Number of participants this month receiving food assistance once:					x1=	0	
2) Number of participants this month receiving food assistance twice:					x2=	0	
3) Number of participants this month receiving food assistance three times:					x3=	0	
4) Number of participants this month receiving food assistance four times:					x4=	0	
5) Number of participants this month receiving food assistance five times:					x5=	0	
6) Totals				0		0	
7) Total number of households served:							

Repeat the process outlined above for the other reports you need to run as appropriate.

- Your report screen will look somewhat similar to what is pictured below, but some specifics may differ. We have created all the templates you need to access all the data we ask you to report to FBNN, based on the type of agency you operate and your unique requirements.

Saved Reports		ADD REPORT +
 Monthly Reports	Just change the date	 EDIT  COPY  DELETE
 3 assistance per month	Just change the date	 EDIT  COPY  DELETE
 2 assistance per month	Just change the date	 EDIT  COPY  DELETE
 1 assistance a month	Just change the date	 EDIT  COPY  DELETE
 Income Extremely Low	Just change the date	 EDIT  COPY  DELETE
 Income Low	Just change the date	 EDIT  COPY  DELETE
 Income Very Low	Just change the date	 EDIT  COPY  DELETE

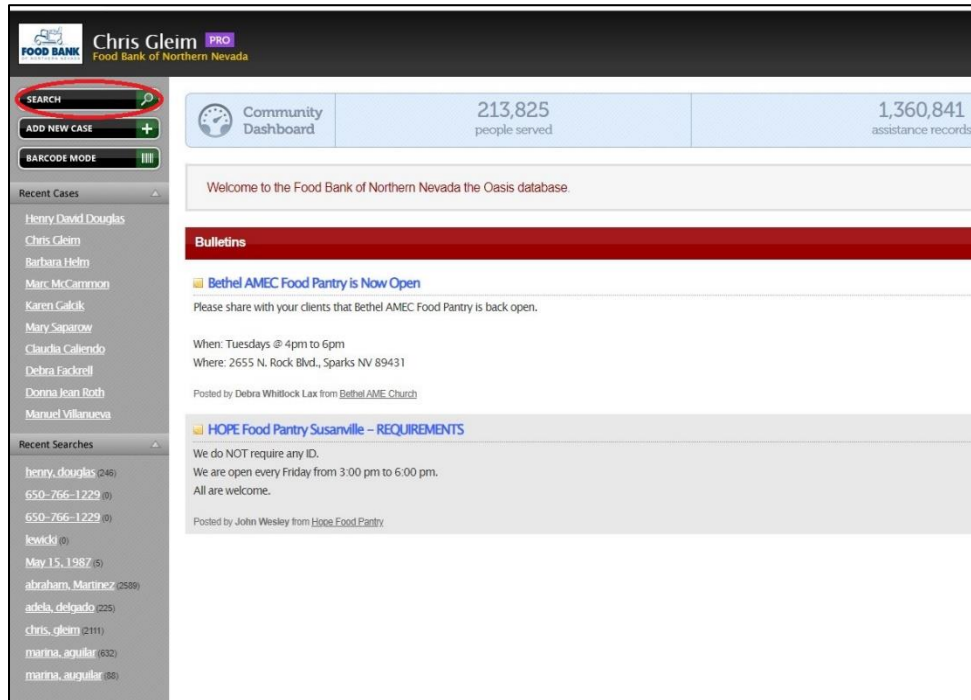
IMPORTANT: If you are ever missing a report template you feel you need, are unable to access the necessary information to report to us, or have ANY question related to reporting, please reach out to one of our staff members ASAP and do NOT make any changes to your report templates!

Barcodes and Barcode Scanning

Barcode scanning is a great way to make your distribution streamlined. Using the barcode function will allow you to add a barcode from any card the client has (Driver's Licenses, Clarity, even a Costco Card) on them to their profile. You will then be able to simply scan this barcode to enter their profile. Assistances can be entered with barcodes as well, which as stated will speed up the check in process, making the clients and your experience better.

Adding a Barcode to a Clients Profile

- From the Oasis home screen. In the top left hand corner hit "Search."



- Find the client being assisted by any of the categories in the screen. Birthday is always recommended. Then choose the correct clients profile.

Advanced Search

First name	Last name	Case ID	Date of birth (MM-DD-YYYY)		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip	Phone	Other ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	CSFP Program Status				
<input type="text"/>	<input type="text"/>				

☐ Only show HEAD OF HOUSEHOLD in search results.

- Once in the profile you will scroll down to where it says “ID Card” on the bottom right side and click on that link.

Address: 1195 Selmi Dr #F101
Reno, NV 89512

County: Washoe County

DOB: May 15, 1987 - 35 years old

Case #: C171273

Phone: Not Provided

Mailing Address: Not Provided

Income - Personal: \$12,000 yr (\$1,000 mo)

Income - Household: \$12,000 yr (\$1,000 mo - 88% poverty)

Expenses - Personal: Not Provided

Expenses - Household: Not Provided

Net Income - Personal: \$12,000 yr (\$1,000 mo)

Net Income - Household: \$12,000 yr (\$1,000 mo)

Total Living in Household: 1

Agency Last Assistance: Nov 10, 2022

Network Last Assistance: Nov 10, 2022

Other IDs: Not Provided

Details: CSFP Program Status: Has Never Participated
Food Distribution Rosters: zArchive - Washoe Valley Christian Church

Ethnicity: Not Hispanic or Latino

Race: White

History of Modifications

Modified by Mike Escobar from [Food Bank of Northern Nevada](#) Fri, Sep 4, 2020 at 11:25 a.m.

Demographic added:
CSFP Program Status: Has Never Participated

Demographic added:
CSFP Legacy Case ID:

Demographic added:
CSFP Proxy Name:

Demographic added:
Legacy CSFP Food Distribution Roster Name:

Demographic added:
Legacy Current Certification Date: None

Demographic added:
Legacy Original Certification Date: None

Demographic added:
Legacy Signature Sheet Notes:

Demographic added:
Legacy Termination Date: None

Demographic added:
Ethnicity: Not Hispanic or Latino

Demographic added:
Race: White

Demographic added:

Personal Info

Assistance 2

Relationships 0

Notes 0

Documents 0

Alerts 0

Applications 0

Outcomes 0

Appointments 0

Assessments 0

Auth. Representative 0

CSFP 0

[EDIT CASE](#)

[FLAG CASE](#)

[CASE REPORT](#)

[ID CARD](#)

- The Id Card box will pop up, and a barcode can be added by pressing “Add Barcode.”

ID Card

IDENTIFICATION CARD C171273
Food Bank of Northern Nevada

Chris Gleim

Associated Barcodes

[[CJ00171273]]
Chris Insight Default Barcode

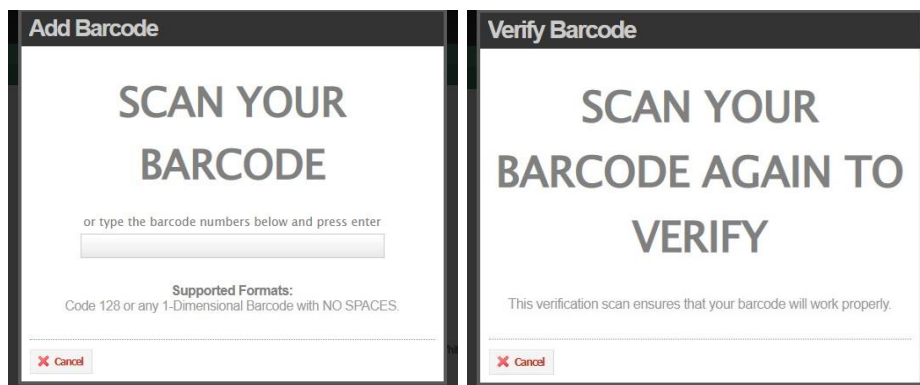
[Add Barcode](#)

[Print ID Card](#) [Email ID Card](#)

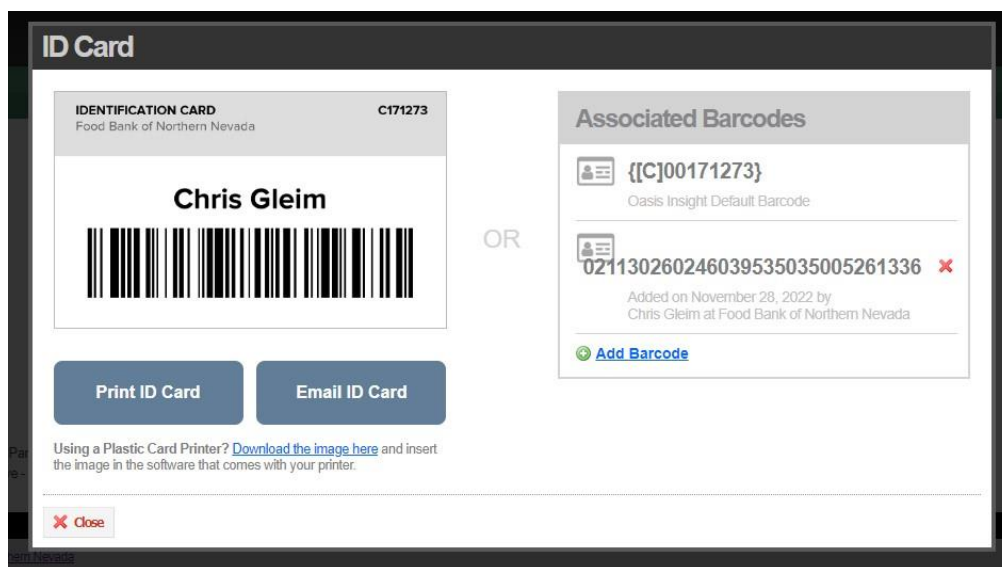
Using a Plastic Card Printer? [Download the image here](#) and insert the image in the software that comes with your printer.

[Close](#)

- Once you hit Add Barcode a screen will pop up where you will need scan the barcode the client has provided with an RF Scanner twice. Once to add, twice to verify.



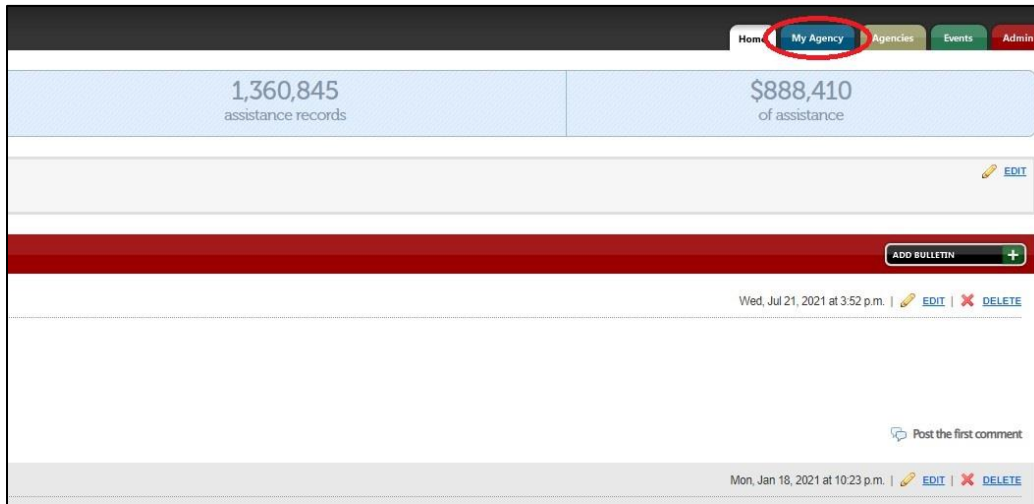
- This barcode will then populate in the ID Card screen. From here you can either close out of the Id Card box or add another barcode using the same process.



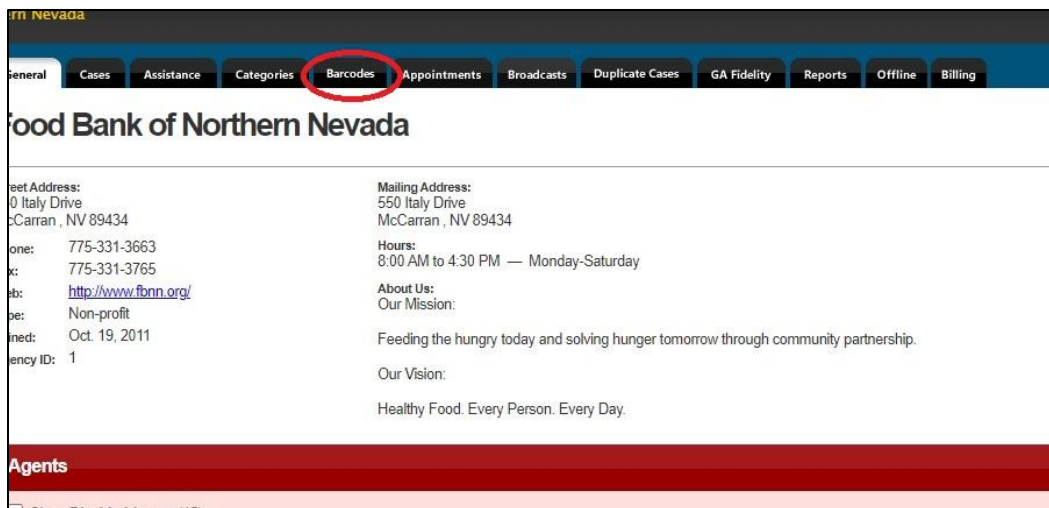
- Next time that client comes through you only need to scan the added barcode to get into the client's profile.

Generating Assistance Barcodes

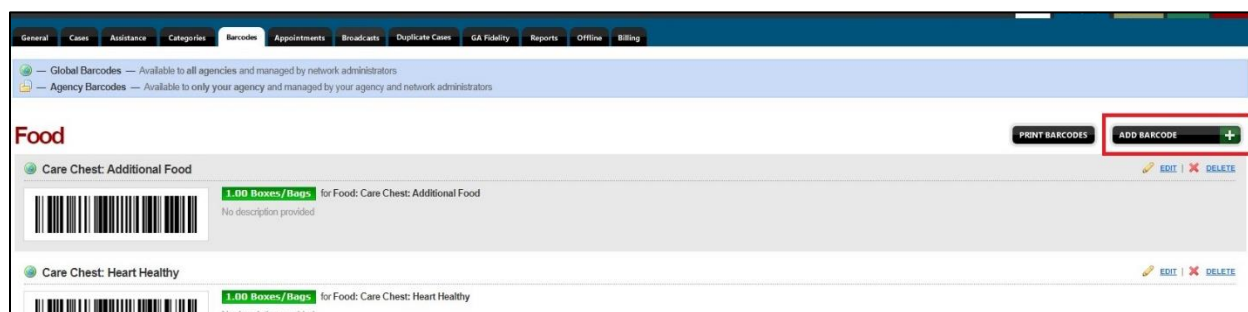
- From the home screen you will need to go to the “My Agency” tab in the top right hand corner.



- Then select the “Barcodes” tab. There will be a good amount of barcodes that are auto generated. You may need to add the following barcodes depending on which programs have at your pantry
 - Food Panty
 - FBNN – TEFAP
 - Golden Groceries
 - Rx Pantry – This will need to include the 3 Rx Categories (Additional Food, Carb Controlled, Heart Healthy) and the location of where the prescription is from.
 - CSFP
 - FBNN – CSFP Box
 - FBNN – CSFP Verbal Recert



- To add a Barcode, press the “Add Barcode.” The “Add Assistance Barcode” box will open.



- Here you will add the following:
 - Barcode Name: Typically, you will name it the same as the Assistance Category.
 - Assistance Category: This is the assistance you are providing from the list above.
 - Assistance Amount: Should always be 1.
 - Assistance Unit: This should always be Box/Bags.

 A screenshot of the 'Add Assistance Barcode' form. The form has a dark header with the title 'Add Assistance Barcode'. Below the header, there are several input fields: 'Barcode Name *' with the text 'Food Pantry', 'Assistance Category *' with a dropdown menu showing 'Food Pantry', 'Assistance Amount *' with the value '1', a checkbox for 'Allow Editing Assistance Amount In Barcode Mode' which is unchecked, 'Assistance Unit *' with a dropdown menu showing 'Box/Bag', and a large text area for 'Assistance Description'. At the bottom of the form, there are two buttons: 'Add Barcode' (with a green plus icon) and 'Cancel' (with a red X icon).

 A screenshot of the 'Add Assistance Barcode' form, similar to the previous one but with different data. The 'Barcode Name *' field contains 'FBNN - TEFAP'. The 'Assistance Category *' dropdown menu also shows 'FBNN - TEFAP'. The 'Assistance Amount *' field still contains '1', and the 'Assistance Unit *' dropdown menu still shows 'Box/Bag'. The 'Allow Editing Assistance Amount In Barcode Mode' checkbox remains unchecked. The 'Assistance Description' text area is empty. The 'Add Barcode' and 'Cancel' buttons are at the bottom.

- Hit “Add Barcode” and the new barcode will populate on the Barcode page.
- Repeat the above steps if you need more assistance barcodes

Printing Barcodes

From the “Barcode” tab under “My Agency” there is a “Print Barcode” button. See below.



- A “Print Assistance Barcode” will pop up. From here you putting in following:
 - Page Title. This can be named anything.
 - Skip “Description:”
 - Keep “Page Layout” as 1 Column.
 - Keep “Include Confirm Assistance Barcode” checked.
 - Press the + button under “Select Barcodes to Include (Skip To Include All)”
 - Press the + button under “Food”
 - Then choose all of the programs you run at the pantry.
 - Then press “Print Barcode”

Print Assistance Barcodes

Page Title *

Barcodes

Description (Optional)

Page Layout

1 Column | 2 Columns

☒ Include Confirm Assistance Barcode

Select Barcodes To Include (Skip To Include All)

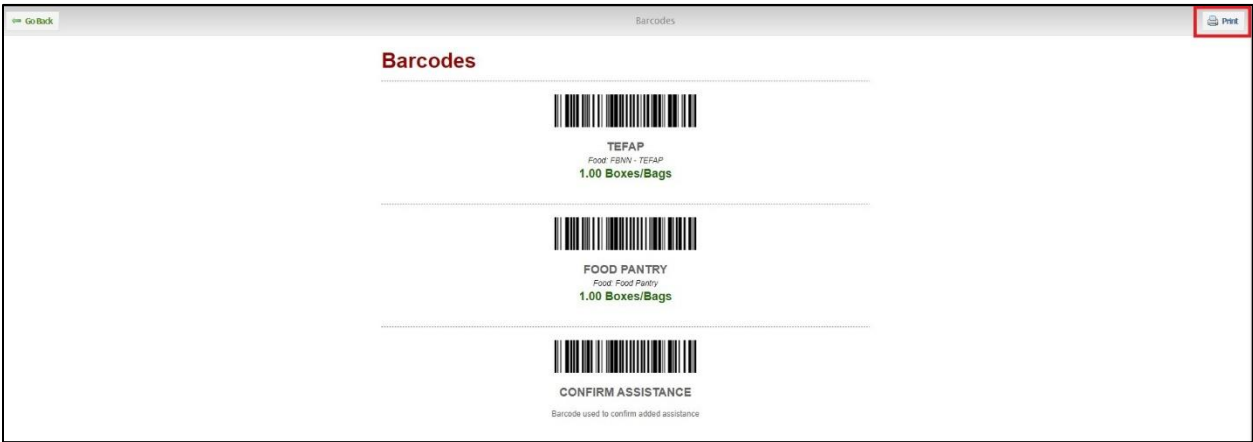
Food

- ☐ Care Chest: Additional Food
- ☐ Care Chest: Heart Healthy
- ☐ Care Chest: Carbohydrate Controlled
- ☐ Carson Tahoe Health: Additional Food
- ☐ Carson Tahoe Health: Cancer Resource Center

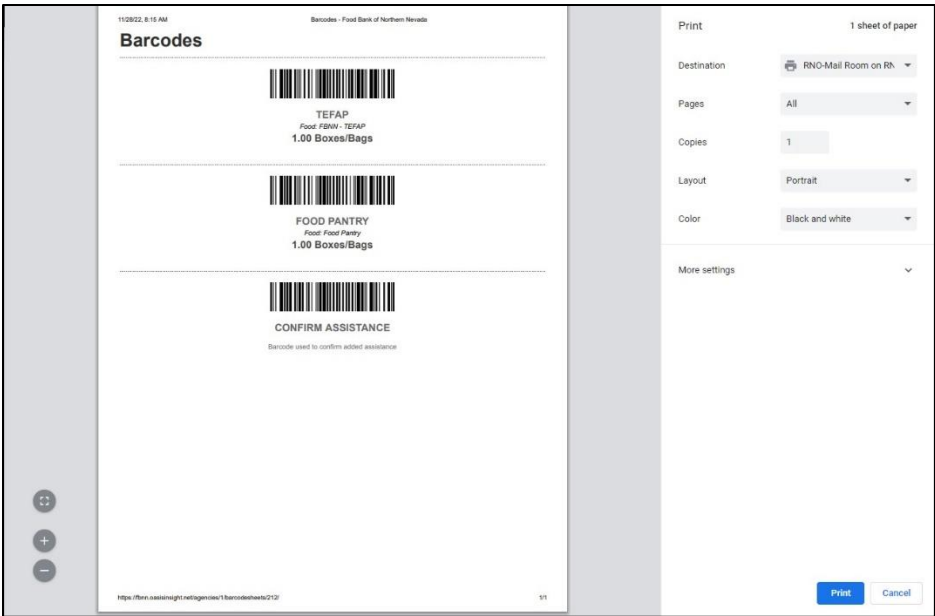
- ☐ Care Chest: Heart Healthy
- ☐ Care Chest: Carbohydrate Controlled
- ☐ Carson Tahoe Health: Additional Food
- ☐ Carson Tahoe Health: Cancer Resource Center
- ☐ Carson Tahoe Health: Carbohydrate Controlled
- ☐ Carson Tahoe Health: Heart Healthy
- ☐ Carson Valley Medical Center: Additional Food
- ☐ Carson Valley Medical Center: Carbohydrate Controlled
- ☐ Carson Valley Medical Center: Heart Healthy
- ☐ Community Health Alliance : Additional Food
- ☐ Community Health Alliance: Carbohydrate Controlled
- ☐ Community Health Alliance: Heart Healthy
- ☐ CSFP - 1 box
- ☐ CSFP - 2 Boxes
- ☐ CSFP - Verbal Recertification
- ☐ Mobile Harvest
- ☐ [TESTING] MOBILE HARVEST
- ☐ Senior Food Box
- ☒ TEFAP
- ☒ Food Pantry
- ☐ Mobile Pantry Produce
- ☐ POW
- ☐ Renown Health: Additional Food
- ☐ Renown Health: Carbohydrate Controlled
- ☐ Renown Health: Heart Healthy
- ☐ UNR Student Outreach: Heart Healthy
- ☐ UNR Student Outreach: Additional Food
- ☐ UNR Student Outreach: Carbohydrate Controlled
- ☐ VA Clinic: Additional Food
- ☐ VA Clinic: Carbohydrate Controlled
- ☐ VA Clinic: Heart Healthy
- ☐ Washoe Tribal Health Ctr: Additional Food
- ☐ Washoe Tribal Health Ctr: Carbohydrate Controlled
- ☐ Washoe Tribal Health Ctr: Heart Healthy
- ☐ WRPT Health Clinic: Additional Food
- ☐ WRPT Health Clinic: Carbohydrate Controlled
- ☐ WRPT Health Clinic: Heart Healthy

Print Barcodes | **Cancel**

- A print page will come up where you need to press “Print” in the top right corner.



- A formal print screen will pop-up where you can send the document to your printer.



- Make sure the format is in Portrait layout and also fit all to one page. This will make it easier for you when checking in clients.

Checking Clients in with Barcodes

Now that we have client barcodes in their profiles, as well as barcodes for each assistance your pantry provides, we can start scanning clients using barcodes.

- Client arrives to be checked in at the pantry. You will need to ask them for any ID or barcode they have attached to their profile.
 - Scan the barcode on the card, and the screen below should pop-up.

The screenshot shows a software interface titled "Barcode Mode". At the top, there is a checkbox labeled "Open this window whenever a barcode is scanned" which is checked, and a link labeled "AVAILABLE BARCODES". Below this is a client profile card for "Chris Gleim" with ID "C171273" and a "VIEW CASE" button. The profile includes address "550 Italy Dr. Sparks, NV 89437", "DOB: Apr 28, 1987", "Living in Household: 1", "Agency Last Assistance: Nov. 10, 2022", "Network Last Assistance: Nov. 10, 2022", and "TEFAP Eligibility — Not Applicable". Below the profile card, the text "SCAN ASSISTANCE BARCODE" is centered. Underneath is a graphic of a barcode scanner with two barcodes. At the bottom is a large red "CANCEL" button.

- If it does not pop up, go ahead and scan the card again to double check that is it not valid.
- If the client does not have their card with associated barcode, you will need to look them up by their birthday. Once you are in their profile you can move to the next step and start scanning assistances.

- Once the “Barcode Mode” box appears, you can just go straight into scanning all the assistances that are being provided.

Note, you do not need to do one at a time; they can all be added at once.

See below (Food Pantry and TEFAP)

- Now that the assistances have been added, scan confirm to complete the process.

Barcode Mode

☒ Open this window whenever a barcode is scanned

Chris Gleim C171273 [VIEW CASE](#)

550 Italy Dr.
Sparks, NV 89437

DOB: Apr 28, 1987
Living in Household: 1
Agency Last Assistance: Nov. 10, 2022
Network Last Assistance: Nov. 10, 2022

TEFAP Eligibility — Not Applicable

ITEM NAME	AMOUNT / UNIT	
TEFAP <small>Food: FSNV - TEFAP</small>	1.00 Boxes/Bags	✗
Approval Type (REQUIRED) PA		
Food Pantry <small>Food: Food Pantry</small>	1.00 Boxes/Bags	✗

CONFIRM ASSISTANCE
click here or press SHIFT + ENTER

CANCEL

NEW — Scan a special barcode to confirm assistance! [Learn more](#)

- Once you have scanned confirm, all of the scanned assistance will appear in the clients “Assistance” tab.

Barcode Mode

☒ Open this window whenever a barcode is scanned

Case #

✓

Created 2 assistance records
for [Chris Gleim](#)

SCAN YOUR NEXT CLIENT ID CARD or **DONE**

- You do not need close the “Barcode Mode” box once you have completed with a client. If the next client has their ID, you can scan their card to bring up the client’s profile, and you can repeat the process.