

## ROI/Release of Information

Next you need to file a Release of Information (ROI) for the neighbor. **All Neighbors entered into Oasis MUST sign an ROI.** The CFBNJ ROI is an agreement to have your personal data entered into our database, as well as their self-declaration statement for the Federal Intake Form. In CFBNJ's Oasis, the ROI is posted in English. For a translations of the ROI to show Neighbors, please see our Appendix section in this book.

**SPECIAL NOTE: The ROI and Recertification process** – A Federal Intake Form is required for all Neighbors that receive TEFAP and SFPP food. These intake forms are required to be completed annually and kept on file at an Agency. To be compliant, you can view and download all your Agency's Federal Intake Forms in the Reports section as needed. **Best practice** when using Oasis is to use the yellow banner (see below picture) to trigger a new ROI. All new Neighbors will trigger a yellow ROI banner. Additionally, when the yellow ROI banner appears at the top of an **existing** Neighbor's Case Information, that indicates a Neighbor either does NOT have an ROI, or their ROI on file is expired. An ROI is considered expired in Oasis after its one year anniversary of signing commences. Therefore, when you see the yellow banner at the top of the Case Information, it indicates it is time to recertify an existing Neighbor. Always check for this yellow banner! Rather than attempting to recertify your entire caseload once a year, with Oasis, you can recertify Neighbors on a rolling basis.

1. Click on the Create ROI button.
2. Upon starting the ROI process, the New Release of Information dialogue box will appear and prompt you to include the date the ROI is being signed (it is prepopulated with the current date) as well as the Neighbor's name (also prechecked for the Neighbor signing). If all this information is correct, select the Next button to continue.
3. At this point, the current ROI will come up on the screen for the Neighbor to view and read.

4. Be sure to guide the Neighbor to the bottom of the screen where they can click to sign their name. Again, you can find translated versions of the ROI in the Appendix section of this training manual to use for non-English speaking Neighbors.
5. Have the neighbor sign the screen and click the Submit Signature button. The Neighbor can sign the ROI either via a touch pad, touch screen or signature pad.
6. After the Neighbor signs the document, the Intake person should then resume control of the device and click the button Verify ROI.
7. When the Confirmation dialogue box appears, click Ok to verify the Neighbor's ROI and upload the document into Oasis.
8. After the ROI is confirmed, you will be brought back to the main screen with that neighbor's information up and ready to go!