

OASIS INSIGHT STEP BY STEP GUIDE

CFBNJ DIAPER & PERIOD PRODUCT INITIATIVE

Creating Assistance Records and Reports

PART 1

Introduction:

Area of Focus,
Objectives, and
Terms/Phrases

PART 2

Intake:

Adding Diaper &
Period Product
Assistance Records

PART 3

Report:

Generating Diaper
& Period Product
Totals
(optional)

PART 1: INTRODUCTION

**Objective**

By the end of this guide, Partners Will Be Able To:

- Create diaper and period product assistance records in Oasis manually and with a barcode scanner.
- View and download Diaper and Period Products reports

**Perks**

If you use Oasis, you can expect:

- Diaper and Period Product reports to be automatically submitted, so you don't have to!
- More reliable and consistent data and reporting

OVERVIEW

Using Oasis Insight for Diaper & Period Product distribution is exactly the same as the general process, with the only difference being partners are not expected or required to submit monthly reports! This guide goes over how to add accurate records for the different products under this initiative. If you are a partner that is interested in seeing your monthly totals, this guide includes an optional section covering how you can.

ABOUT THE PRODUCTS

Packaging	Quantity	Available Products	Available Sizes
1 Sleeve	25 Diapers	Adult Incontinence	Medium, Large, XLarge
1 Pack	18 Maxi Thin or 24 Maxi Regular	Period	Maxi Thin, Maxi Regular
1 Case/Box	8 Sleeves of Diapers or 12 packs of Pads	Diaper	Newborn - 7

PART 2: ADDING A DIAPER/PERIOD PRODUCT ASSISTANCE RECORD

During distribution days, it is important to **Add Assistance** records of the goods/products received into neighbor's case page during intake. There are two ways to add an assistance record to a neighbor's case.

First, we'll go over the steps to do this manually.

STEP 1

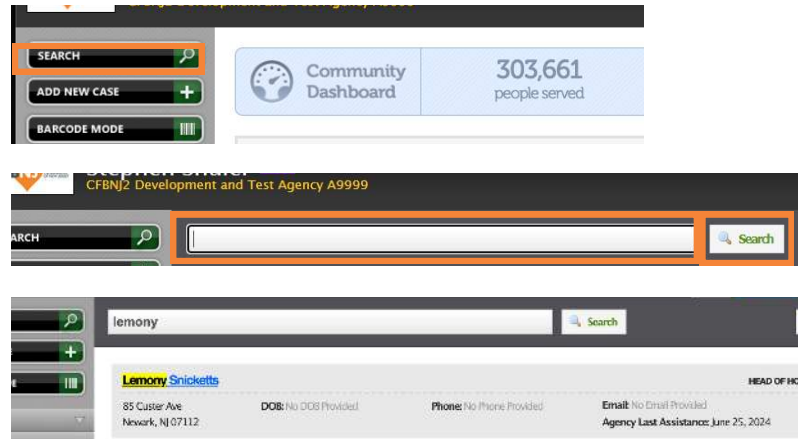
To begin, sign into your Oasis account at cfbnj2.oasisinsight.net


Click the "Search" button located at the top of the left side menu.

Enter the neighbor's name, then click



Click the neighbor's name to be redirected to their case.

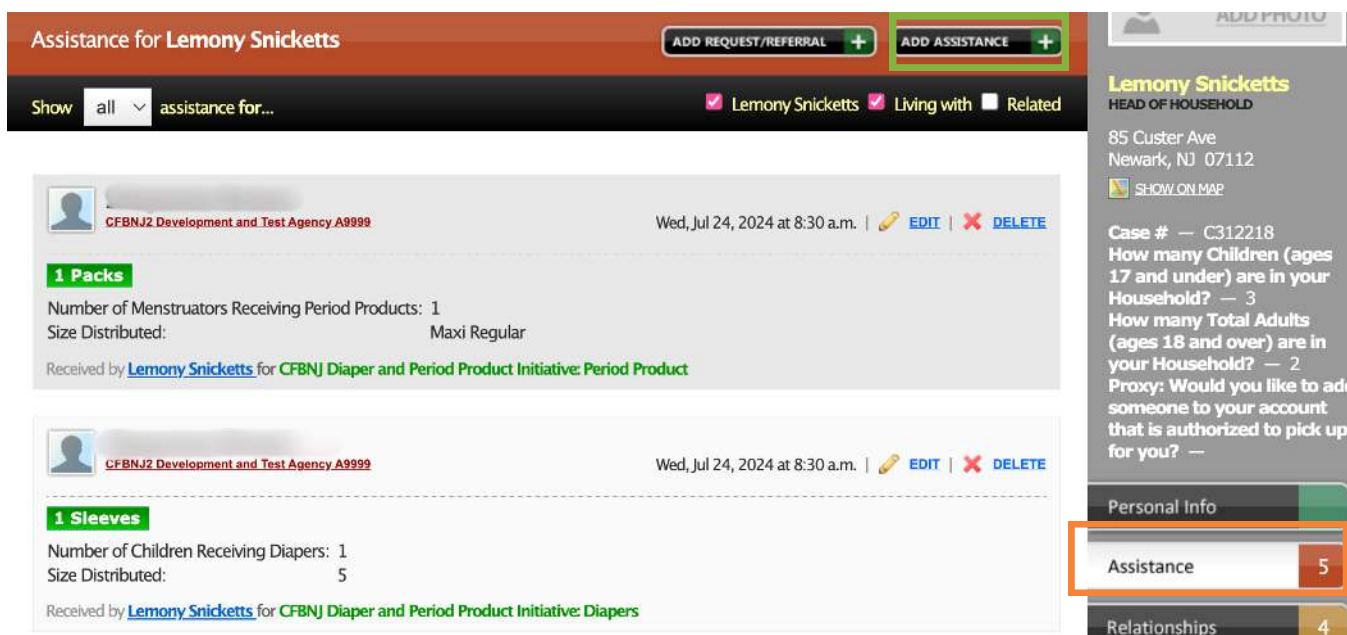


 If your search produces no results, run an advanced search, and add one other detail, such as a phone number or birthdate.

STEP 2

Locate and click **Assistance** on the right side menu of the neighbor's case.

Once the page opens, you will either see a list of the neighbors' assistance records, or a message to create the first assistance record. Click **ADD ASSISTANCE** located in the orange banner at the top of the page.

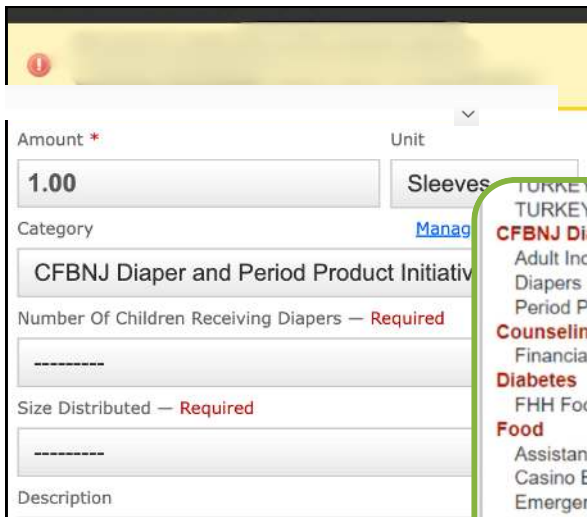


 The number you see next to the word assistance is there as an indication of how many times the neighbor has received assistance. 2

STEP 3

The **Add Assistance** window will pop-up.

Click the **Category** drop down menu to reveal a list of categories.



Scroll down the list until you see this section:

CFBNJ Diaper and Period Product Initiative.

Select one of the products:

- Adult Incontinence Product
- Diaper
- Period Product



After selecting each product once, they will start to appear at the top of the drop down lists Recent Category.

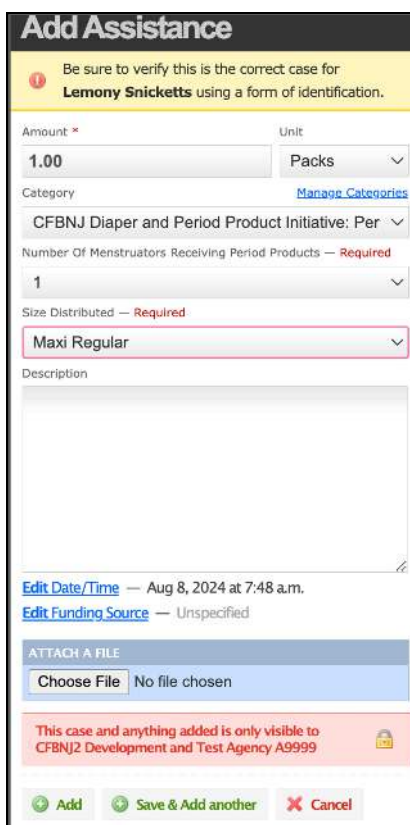
STEP 4

After selecting the product, input the number of **household members** receiving the product(s), as well as **the size(s)** being distributed, then click **Add**.



If the neighbor requests 2 or more of the same product, increase the amount.

You'll be returned to the neighbor's case, where the new record will now be reflected at the top of the list.



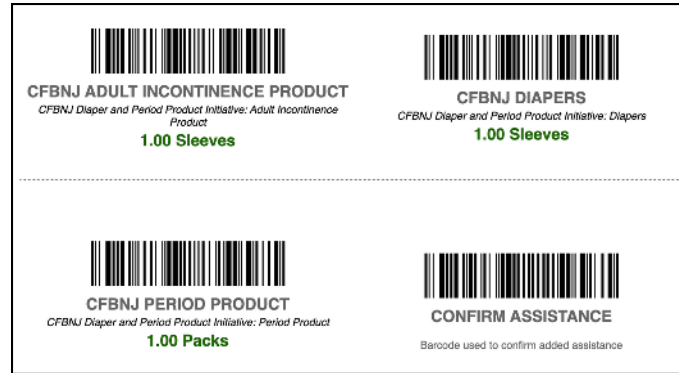

Show	all	assistance for...	Case #	Date	Actions
Sheyenne Brown	CFBNJ2 Development and Test Agency A9999	1 Sleeve	13322218	Thu, Aug 8, 2024 at 8:25 a.m.	EDIT X DELETE
Sheyenne Brown	CFBNJ2 Development and Test Agency A9999	1 Packs	13322218	Thu, Aug 8, 2024 at 7:45 a.m.	EDIT X DELETE
Sheyenne Brown	CFBNJ2 Development and Test Agency A9999	1 Packs	13322218	Wed, Jul 24, 2024 at 8:30 a.m.	EDIT X DELETE

Adding Assistance Records Using Barcode Scanners.

Now, we'll go over how you can add an assistance record using barcode scanners and assistance barcodes.

STEP 1

Navigate to the neighbor's case, and with your scanner, scan the barcode of the relevant assistance category.



You do not need to click Barcode Mode or any additional steps. You just scan!

If your agency has not received any Chromebooks and/or barcode scanners and would like to receive the CFBNJ provided equipment, please send an email to serviceinsights@cfbnj.org.

STEP 2

To create a record for multiple products and sizes at once, scan each relevant barcode.

If the neighbor requests **2 or more of the same product in different sizes**, scan the barcode for each size.

After you've input quantities/sizes, click **Cofirm Assistance**.

You will be directed to a pop-up confirming that the assistance has been recorded.

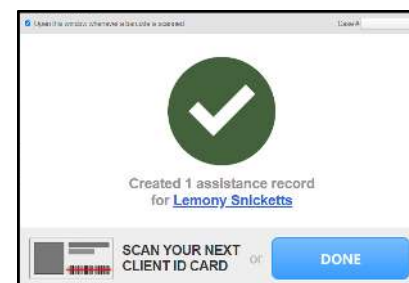
Click

DONE

ITEM NAME	AMOUNT / UNIT	
CFBNJ Diapers <small>CFBNJ Diaper and Period Product Initiative: Diapers</small>	1.00 Sleeves	✗
CFBNJ Diapers <small>CFBNJ Diaper and Period Product Initiative: Diapers</small>	1.00 Sleeves	✗
TEFAP + SFPP + Non-Government Food <small>Food: TEFAP - SFPP - Non-Government Food</small>	1.00 Boxes/Bags	✗
CFBNJ Period Product <small>CFBNJ Diaper and Period Product Initiative: Period Product</small>	1.00 Packs	✗

Attn: Suburban Data Corp - Aug 10, 2014 at 10:00

CONFIRM ASSISTANCE (click here or press [SHIFT] + [ENTER]) **CANCEL**



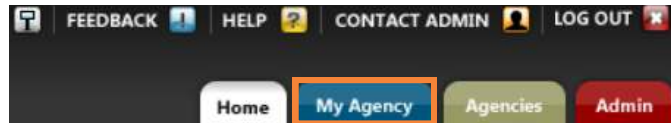
Depending on your screen's size, you may need to scroll down in order to see the confirm assistance button.

[OPTIONAL] GENERATING DIAPER/PERIOD PRODUCT REPORTS

In this section, we will go over the step by step process to create a report. Though you are not required to submit a report to CFBNJ for diaper and period products, you may still find value in the ease of inventory tracking that Oasis offers.

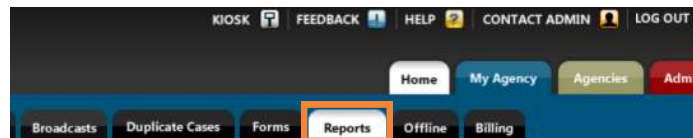
STEP 1

Click the blue **My Agency** tab that is located in the top right corner of the page.



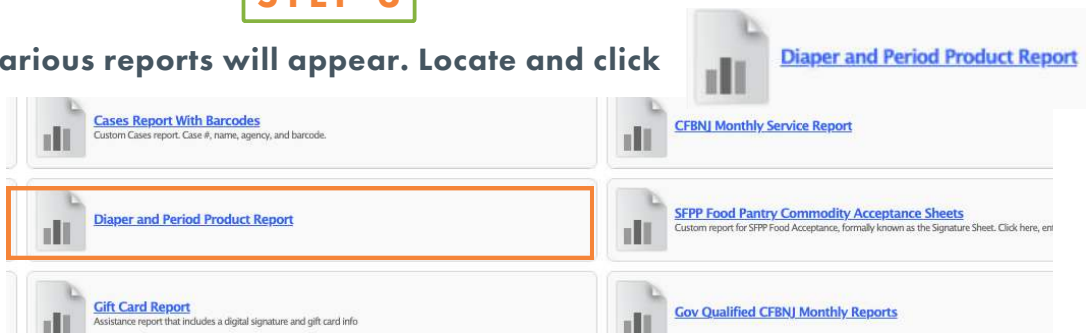
STEP 2

At the top of the page, you will see a menu of black tabs. Click the **Reports** tab.



STEP 3

A list of various reports will appear. Locate and click



STEP 4

A window will pop up displaying filter options. Click **Filter By Date Of Assistance (Skip To Include All)**

A field for dates will be revealed.

Enter dates in **MM-DD-YYYY** format.

Click next at the bottom of the window.

Choose Filters for Report

☒ Include **Private Assistance**

Filter By Date Of Assistance (Skip To Include All)

Start Date (MM-DD-YYYY) End Date (MM-DD-YYYY)

5 - 1 - 2024 to 5 - 31 - 2024

☐ 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)

Choose Filters for Report

☒ Include **Private Assistance**

Filter By Date Of Assistance (Skip To Include All)

Start Date (MM-DD-YYYY) End Date (MM-DD-YYYY)

5 - 1 - 2024 to 5 - 31 - 2024

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

Filter By Number Of Times Assisted (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)

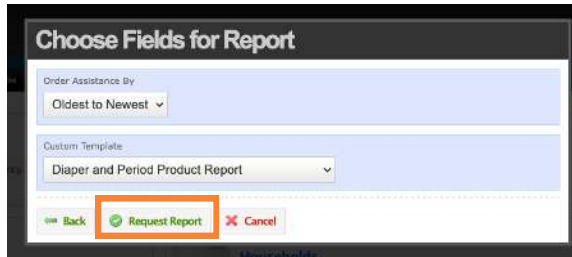
Filter By Group (Skip To Include All)

Next **Cancel**

 "Filter By Date Of Assistance (Skip To Include All)" is the only filter that you will need to use for the purposes of monthly reporting.

STEP 4

To begin generating your report click 



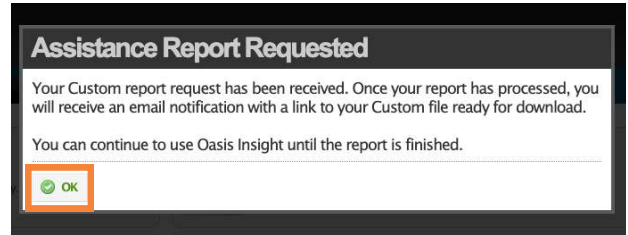
Choose Fields for Report

Order Assistance By
Oldest to Newest

Custom Template
Diaper and Period Product Report

Back Request Report Cancel

Another message will appear. Click **OK**.



Assistance Report Requested

Your Custom report request has been received. Once your report has processed, you will receive an email notification with a link to your Custom file ready for download.

You can continue to use Oasis Insight until the report is finished.

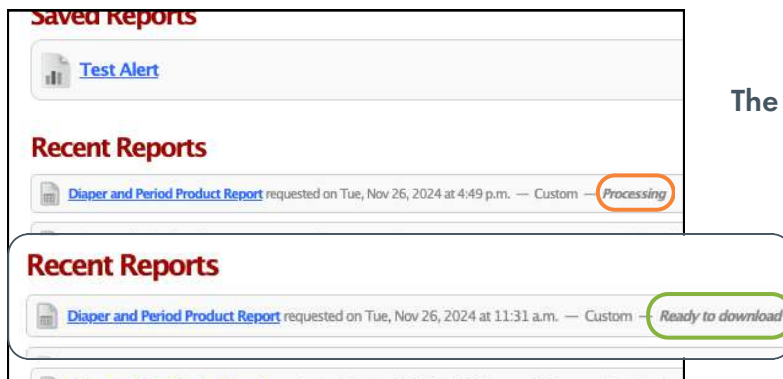
OK

After clicking **OK**, you will be returned to the Reports page.

STEP 5

Scroll down to locate the **Recent Reports** section.

Here, you will find a list of reports that you have most recently generated.



Saved Reports

Test Alert

Recent Reports

Diaper and Period Product Report requested on Tue, Nov 26, 2024 at 4:49 p.m. — Custom — Processing

Recent Reports

Diaper and Period Product Report requested on Tue, Nov 26, 2024 at 11:31 a.m. — Custom — Ready to download

The status of your report will automatically be displayed as **Processing**.

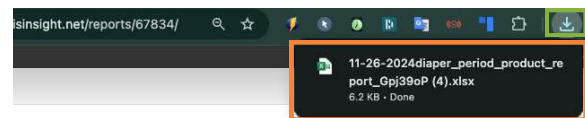
Once the status displays as **Ready to Download**,
Click the **report title**.

 If the status does not change from "processing" for too long, you may need to refresh your browser.

STEP 6

Click on the **blue hyperlink** to download your report.

To open the report, click the **file name** or **download arrow**.



11-26-2024diaper_period_product_report_Gpj39oP (4).xlsx
6.2 KB • Done

 Your Custom Report is Ready to Download
[Right-click here and choose "Save Link As..."](#)

Diaper and Period Product Report		05/01/2024 to 05/31/2024																	
Total Number of Adults Served		4																	
Total Number of Children Served		39																	
Total Number of Menstruators		13																	
Total Diapers Distributed		35																	
Diaper Size New Born Totals		4																	
Diaper Size 1 Totals		0																	
Diaper Size 2 Totals		5																	
Diaper Size 3 Totals		9																	
Diaper Size 4 Totals		4																	
Diaper Size 5 Totals		6																	
Diaper Size 6 Totals		2																	
Diaper Size 7 Totals		2																	
Total Adult Incontinence Products Distributed		5																	
Adult Incontinence Product Size Medium Total		1																	
Adult Incontinence Product Size Large Total		3																	
Adult Incontinence Product Size Extra Large Total		0																	
Total Period Products Distributed		13																	
Period Product Size Maxi Regular Total		4																	
Period Product Size Maxi Thin Total		8																	
Agency ID	Agency Name	Adult Incontinence Product Number	Total Number of Adults Receiving Incontinence	Category: Diapers Number of Children Receiving	Total Number of Diapers	Period Products Number of Menstruators	Total Number of Period Products	Size	Small	Medium	Large	Extra Large	Maxi Regular	Maxi Thin					
A9999-01	CFBNJ Test	4	5	39	35	13	13	4	0	5	9	4	6	2	1	3	0	4	8