

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

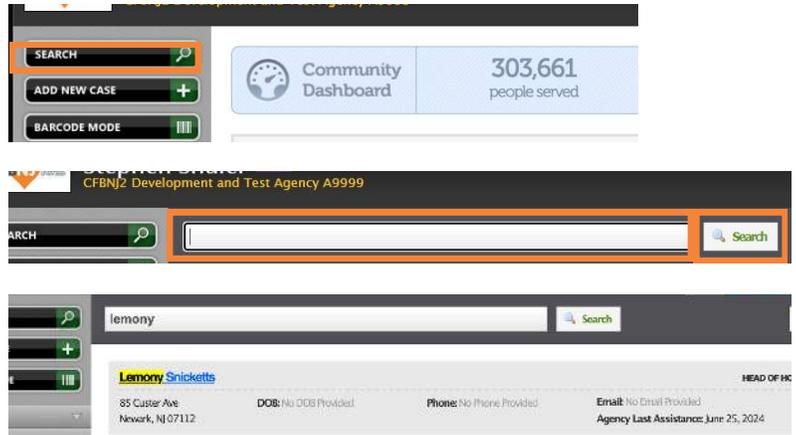
To begin, sign into your Oasis account at cfbnj2.oasisinsight.net

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.

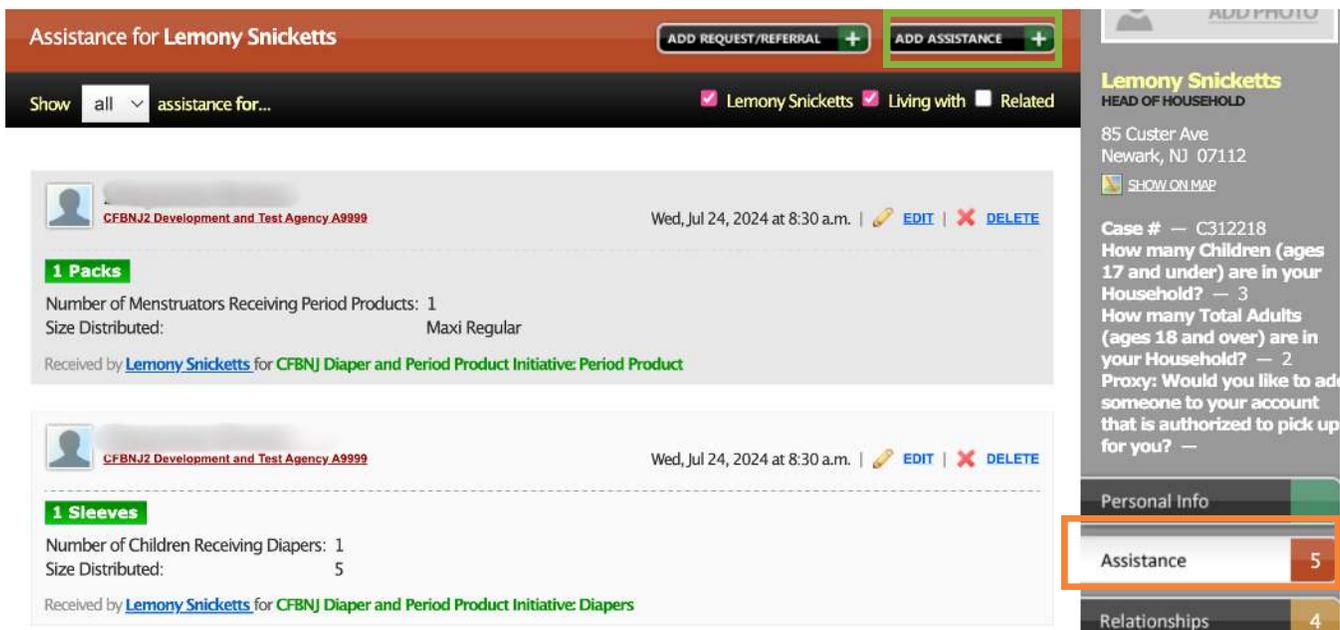


If your search produces no results, run an advanced search, and add one other detail, such as a phone number or birthdate.

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.

Name	Product	Amount	Unit	Date
Sheyenne Brown	3 Sleeves	1	Newborn	Thu, Aug 8, 2024 at 8:25 a.m.
Sheyenne Brown	1 Packs	1	Maxi Regular	Thu, Aug 8, 2024 at 7:45 a.m.
Sheyenne Brown	1 Packs	1	Maxi Regular	Wed, Jul 24, 2024 at 8:30 a.m.

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**.

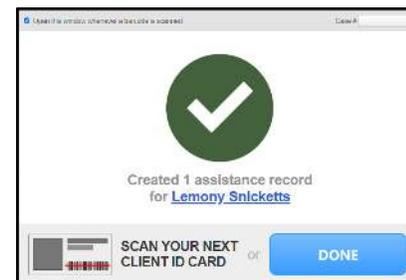
After you've input quantities/sizes, click **Cofirm Assistance**.

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

ITEM NAME	AMOUNT / UNIT	
CFBNJ Diapers <small>CFBNJ Diaper and Period Product Initiative: Diapers</small>		
Number of Diapers Remaining Diapers	1.00 Sleeves	✗
Size Selected	None	
CFBNJ Diapers <small>CFBNJ Diaper and Period Product Initiative: Diapers</small>		
Number of Diapers Remaining Diapers	1.00 Sleeves	✗
Size Selected	4	
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>		
Number of Miscellaneous Remaining Period Products	1.00 Packs	✗
Size Selected	Max Request	

8/10/2024 10:30 AM

CONFIRM ASSISTANCE (click here or press START + ENTER) **CANCEL**



Click



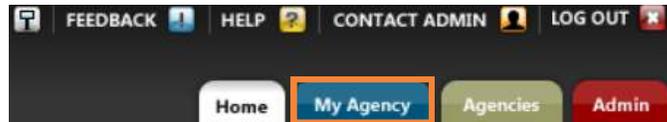
Depending on your screen's size, you may need to scroll down in order to see the confirm assistance button.

[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.

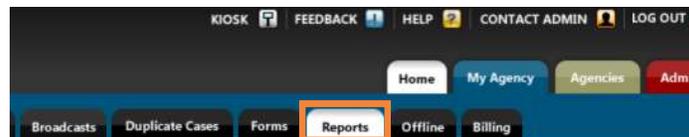
STEP 1

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



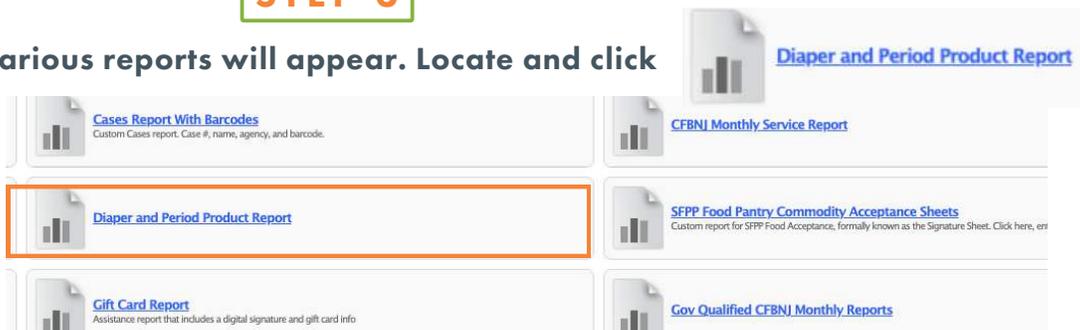
STEP 2

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.

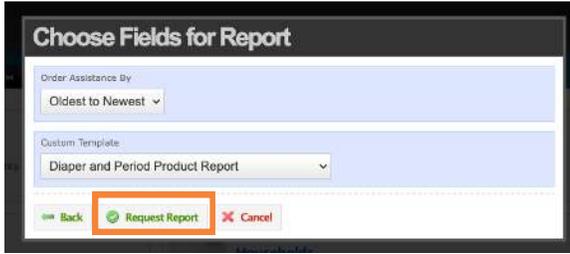
Click next at the bottom of the window.



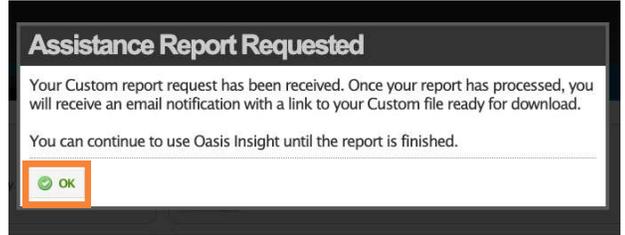
"Filter By Date Of Assistance (Skip To Include All)" is the only filter that you will need to use for the purposes of monthly reporting.

STEP 4

To begin generating your report click Request Report



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

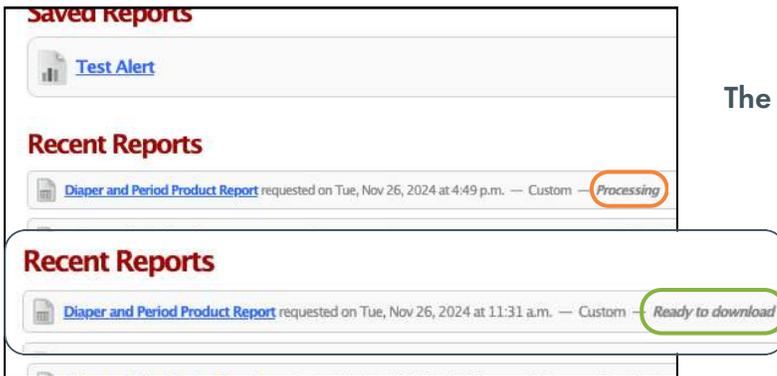


After clicking **OK**, you will be returned to the Reports page.

STEP 5

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

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



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**.



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 Incontinence	Category: Diapers	Total Number of Children Receiving	Period Products	Total Number of Menstruators	Diapers							Adult Incontinence Product			Period Products			
A9999-01	CFBNJ Test	4	5	39	35	13	13	4	0	5	9	4	6	2	2	1	3	0	4	8	8