

OASIS INSIGHT STEP BY STEP GUIDE

HOW TO USE KEY TAGS WITH OASIS INSIGHT

For All Community Partners

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Introduction

Objectives, Perks
and Overview.

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Create Key Tags

Locating I.D. and
assigning a key tag
to a case.

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A few common
questions and
guidance

PART 1: INTRODUCTION

Objective

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

- Assign CFBNJ key tags to a neighbor's case I.D. card
- Use key tags to accelerate intake during distribution

Perks

If you master this skill/process, you can expect:

- Smoother distribution operations
- More reliable and consistent data and reporting

OVERVIEW

Every new case created is automatically assigned an Oasis generated case number and ID card. Partners have the option to make digital or printed ID cards, as well as the ability to add other scannable forms of I.D. such as CFBNJ branded key tags which can be used to quickly find neighbor cases during distribution.

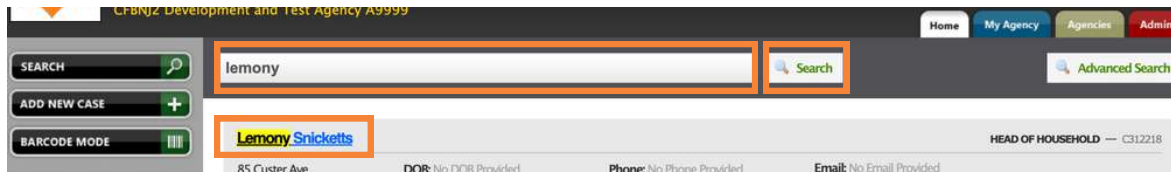


CFBNJ key tags are available in limited quantity to promote speedier intake.

PART 2.1: LOCATING NEIGHBOR'S OASIS IDENTIFICATION CARD

STEP 1

After clicking **SEARCH** on the left side menu, enter the neighbor's name and click **Search**

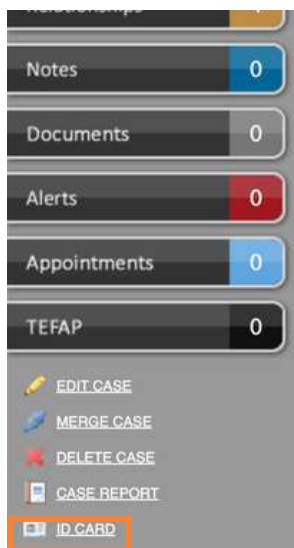


Click the neighbor's name to view their case.

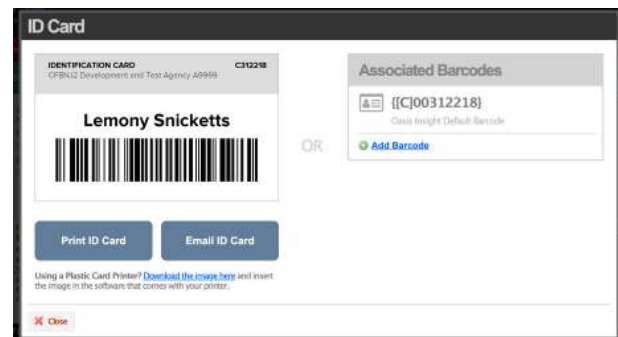
 If their case does not appear, run an advanced search using other identifying details such as address, phone number or birthdate.


STEP 2

From the right side menu, Locate and click **ID CARD**



A new screen will appear. Displaying the neighbor's Oasis ID information.

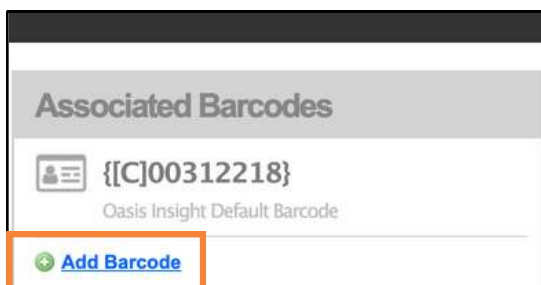


 Whenever a new case is added, Oasis automatically generates a unique case number and barcode.

PART 2.2: ASSIGNING A KEY TAG TO NEIGHBOR'S CASE

STEP 3

To assign a key tag, click **Add Barcode**.



The **Add Barcode** window will open.





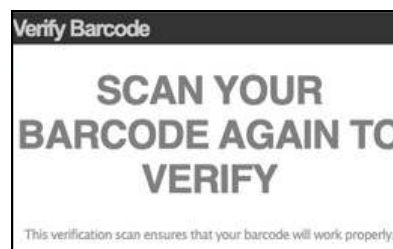
If your agency has not received any Chromebooks and/or barcode scanners and would like to receive the CFBNJ provided equipment, please send an email to serviceinsights@cfnj.org.

STEP 4

With your barcode scanner,
Scan the back of the key tag.



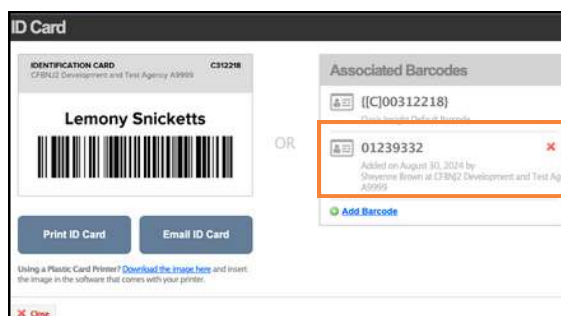
When prompted, scan the key tag
again to verify the barcode.




Note that the key tag number will be different from the existing number associated with the neighbor's case.

STEP 5

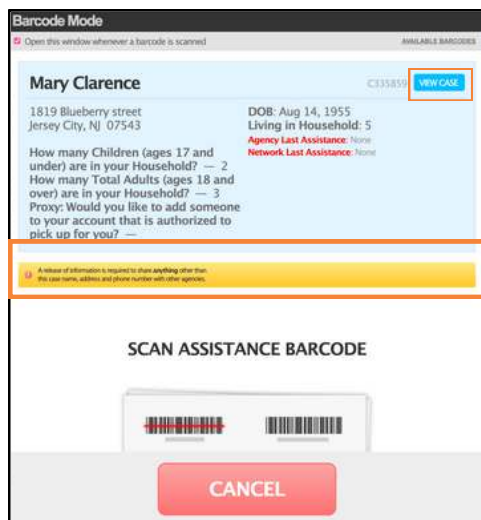
Once verified, the key tag number will appear as an associated barcode on the neighbor's case.




Confirm that the barcode number
matches what is listed on the back of
the key tag. Then, click 

STEP 6

Scan the neighbor's ID card. A new screen will appear with the neighbor's information.



If the neighbor's ROI is expired, you will see a
yellow bar below their information.

To renew or add their ROI, click  and
complete the standard ROI steps outlined in the
[How to Intake Neighbors with Oasis Insight Guide](#).

STEP 7

After completing the initial steps for intaking a neighbor, their case page will remain opened on your screen. With your barcode scanner connected to your Chromebook (or the device used during distribution), scan the appropriate assistance code.

**Gov Qualified Food Barcode****Non-Gov Qualified Food Barcode**


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

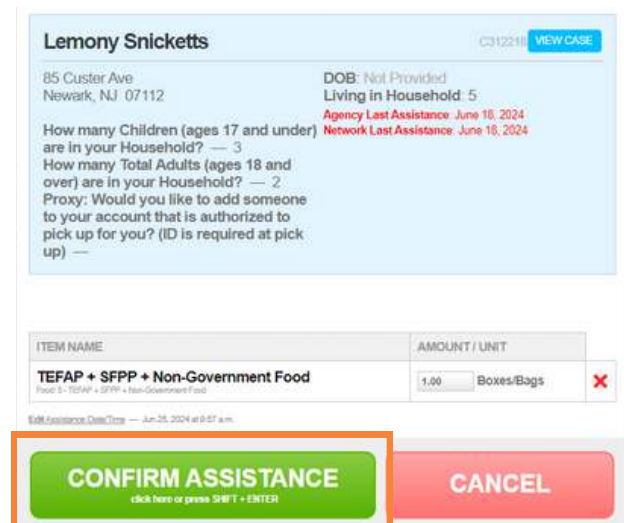
STEP 8

A window summarizing the assistance your neighbor is receiving will open.

Confirm the correct item code and quantities are reflected. If the neighbor is receiving multiple types of assistance, you can scan all barcodes at once.

After you have confirmed, click:

The assistance record has been recorded. You will then be directed to a pop-up confirming that the assistance has been recorded. Click  and you're done!



Lemony Snicketts C312211 [VIEW CASE](#)

85 Custer Ave
Newark, NJ 07112

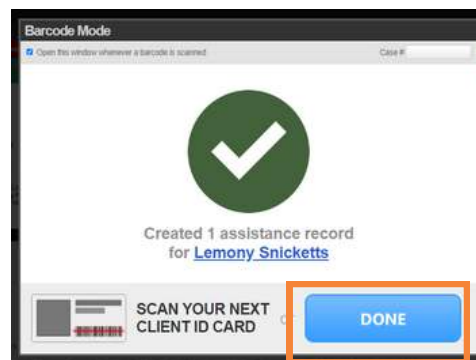
DOB: Not Provided
Living in Household: 5
Agency Last Assistance: June 18, 2024
Network Last Assistance: June 18, 2024

How many Children (ages 17 and under) are in your Household? — 3
How many Total Adults (ages 18 and over) are in your Household? — 2
Proxy: Would you like to add someone to your account that is authorized to pick up for you? (ID is required at pick up) —

ITEM NAME	AMOUNT / UNIT
TEFAP + SFPP + Non-Government Food <small>Food 5 - TEFAP + SFPP + Non-Government Food</small>	1.00 Boxes/Bags


Full Assistance Due Date: Jun-25, 2024 at 9:57 a.m.

CONFIRM ASSISTANCE click here or press SHIFT + ENTER **CANCEL**





Barcode Mode

☒ Open this window whenever a barcode is scanned



Created 1 assistance record for **Lemony Snicketts**

 SCAN YOUR NEXT CLIENT ID CARD 



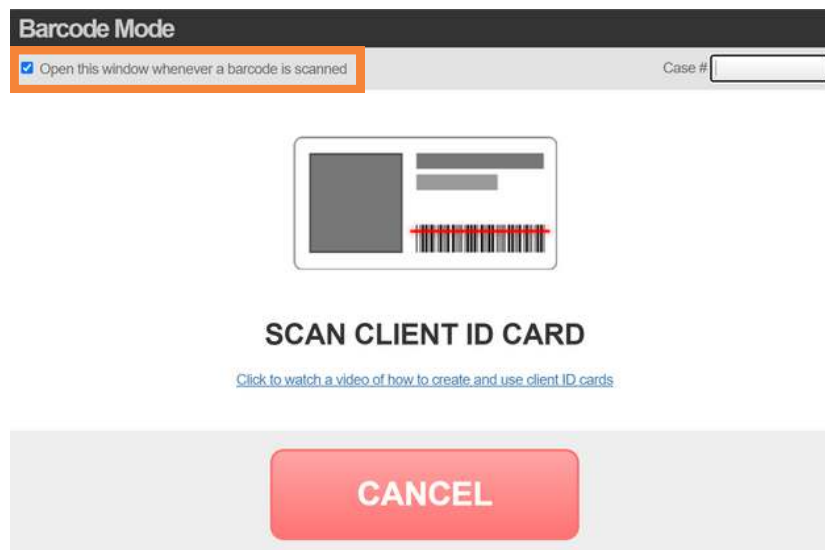
Depending on your screen's size, you may need to scroll down in order to see the confirm assistance button.

USING BARCODE MODE TO SCAN NEIGHBOT KEY TAGS

If you prefer being directed to the neighbor's case instead of the barcode screen, click

A screenshot of the CFBNJ Development and Test Agency A9999 dashboard. The top navigation bar includes links for KIOSK, FEEDBACK, HELP, CONTACT ADMIN, and LOG OUT. The main content area features a "Community Dashboard" with statistics: 279,869 people served, 1,634,390 assistance records, and \$194,184 of assistance. A sidebar on the left contains a search bar, "ADD NEW CASE", and a "BARCODE MODE" button highlighted with an orange box. Below the dashboard, a welcome message states: "Welcome to the Community Food Bank of NJ's OasisPRO Database. Monthly Reports are sent to PartnerReporting@CFBNJ.org and due on the 7th of each month. All Monthly Reports (paper form) can be found at <https://cfbnj.org/resources/>".

Deselect the check mark next to "Open this window whenever a barcode is scanned".

A dialog box titled "Barcode Mode". It contains a checkbox labeled "Open this window whenever a barcode is scanned" which is currently checked and highlighted with an orange box. To the right of the checkbox is a "Case #" input field. Below the checkbox is a graphic of a client ID card with a barcode. The text "SCAN CLIENT ID CARD" is displayed below the graphic, followed by a link: "Click to watch a video of how to create and use client ID cards". At the bottom of the dialog is a large red "CANCEL" button.

Whenever an ID card is scanned in this mode, you will be directed to the neighbor's full case until the mode is changed.

PART 3: KEY TAG DISCLAIMERS



What if...

...A NEIGHBOR HAS A KEY TAG FROM A DIFFERENT AGENCY ALREADY?

- Due to our privacy settings in Oasis, if a neighbor visits multiple pantries that are using CFBNJ's key tags, they will need to have a unique barcode for each agency. I.E., if a neighbor receives assistance from two different organizations, they will need two key tags. We recommend keeping a Sharpie on hand and writing the initials of your organization within the white heart on the front of the key tag to help the neighbor identify which key tag is for which organization.
- If a key tag from another agency is scanned, the neighbor's basic information (name, address, DOB), will appear. When you attempt to either view their case or add an assistance record, Oasis will prevent you from doing so.



What happens...

...WHEN A NEIGHBOR LOSES OR MISPLACES THEIR KEY TAG?

- Simply add another associated barcode to their case, but do NOT delete the previously associated barcodes. By keeping any other barcodes, you are able to have a record of how many key tags your organization has provided to this neighbor already.
- Please note, CFBNJ is only providing a limited supply of key tags per agency. We recommend offering up to 2 replacement key tags per household.



What should I do if...

...MY NEIGHBORS KEEP FORGETTING THEIR KEY TAGS?

- The key tags are supplemental and Oasis still functions fully without them. If you are concerned about a neighbor misplacing their key tags, we recommend having the neighbor take a photo of the key tag. The CFBNJ provided barcode scanners are capable of scanning a photo of barcode on a phone screen!
- If you do not have a CFBNJ provided barcode scanner, please reach out to serviceinsights@cfbnj.org