

OASIS INSIGHT STEP BY STEP GUIDE

HOW TO GENERATE CFBNJ MONTHLY REPORTS

For Non-Government Qualified Partners

PART 1

Introduction:
What to Expect in
This Guide

PART 2

Creating CFBNJ
Monthly Service &
Non-Gov Commodity
Acceptance Reports

PART 1: INTRODUCTION

In order to maintain partnership with CFBNJ, agencies that only distribute our non-government food (CO-OP or donated) are required to submit a total of two monthly reports via email to partnerreporting@cfbnj.org by the 7th of every month. Agencies that are consistently in violation of this policy may be put on hold until they are in compliance.

Focus CFBNJ Monthly Service Report • Non-Gov Commodity Acceptance Sheets

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

- Easily generate and download required CFBNJ monthly reports.
- Locate and use the CFBNJ Non-Gov Qualified Monthly Reports shortcut to generate 2 monthly reports.

Perks  Efficiently find and download all of your required reports digitally in 15 minutes or less.



Streamline the process of reporting, reducing the number of manual tasks to complete.



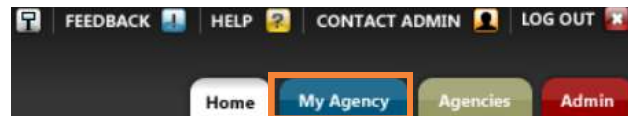
Increase the likelihood of submitting required reports on time, maintaining your agency's good standing.

PART 2: NON-GOV QUALIFIED MONTHLY REPORTS

In this section, we will go over the step by step process for using this handy [Non-Gov Qualified CFBNJ Monthly Reports shortcut](#) that generates the following reports at once: CFBNJ Monthly Service Report and Non-Gov Commodity Acceptance Sheet.

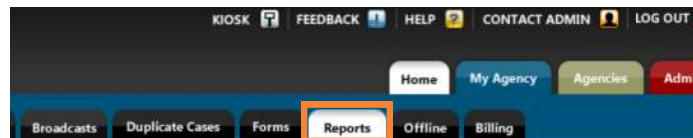
STEP 1

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



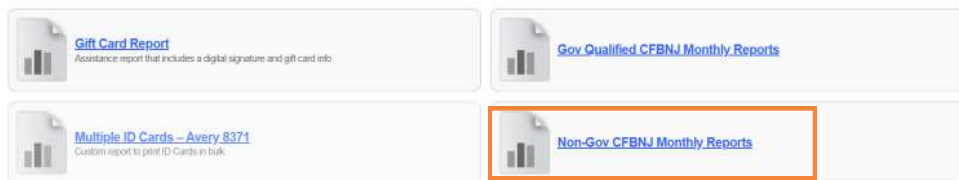
STEP 2

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. Scroll down until you see [Non-Gov CFBNJ Monthly Reports](#) and then 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.

Choose Filters for Report

☒ Include **Private** Assistance

[Filter By Date Of Assistance \(Skip To Include All\)](#)

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

☐ 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 \(Skip To Include All\)](#)

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

Choose Filters for Report

☒ Include **Private** Assistance

[Filter By Date Of Assistance \(Skip To Include All\)](#)

Start Date (MM-DD-YYYY) 5 - 1 - 2024 to End Date (MM-DD-YYYY) 5 - 31 - 2024

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

[Filter By Number Of Times Assisted \(Skip To Include All\)](#)

Click next at the bottom of the window.

[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 5

To begin generating your report,
locate and click 

On the next screen, Click on the
blue hyperlink to open your report.

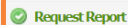
Choose Fields for Report

Order Assistance By

Oldest to Newest ▾

Custom Template

Non-Gov CFBNJ Monthly Reports ▾

 Back Request Report Cancel

Your Custom Report is Ready to Download

[Right-click here and choose "Save Link As..."](#)

Depending on the size of your report, it may take a few minutes for it to load.

STEP 6

The pdf will open. Scroll through to confirm that both reports are reflected.

Monthly Service Report

The Monthly Service Report is intended to capture TOTAL monthly household/individuals or meals served, inclusive of all product types received from CFBNJ, (i.e., TEAP, SFP, and warehouse reports) as close to a requirement of your membership. Please submit the following information below by the 7th day of the following month with the FoodBank, (i.e., January's report would be due on Feb 7th). The reports can be emailed to Network Relations at PartnerReporting@cfbnj.org.

CFBNJ Non-Gov Commodity Acceptance Form

Agency: CFBNJ Development and Test Agency: A1234-01 No: 123456789

Month: May Yr: 2024

| Item | Product Name | QTY | Units | Value | Net Address | Zip Code |
|------|----------------|-----|-------|-------|-------------------------|----------|
| 1 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 2 | CFBNJ SFP | 3 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 3 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 4 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 5 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 6 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 7 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 8 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 9 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |
| 10 | CFBNJ TEAP SFP | 2 | 1 | 10000 | 20 Empire Commerce Road | 07215 |

A. Pantry Programs & Other Non-Meal Distributions

CFBNJ Signature Sheet

Number of Adults (over 18) served during the month: 64

Number of Children (under 18) served during the month: 29

Total Number of persons served during the month: 93

Total Number of Households served during the month: 18

B. On-Premise/Congregate Feeding Programs Agency ID: A1234-01
(Soup Kitchens, Group Homes, Shelters, After school programs)

To download, Click on the down arrow at the top right of the screen.

Monthly Service Report

The Monthly Service Report is intended to capture TOTAL monthly household/individuals or meals served, inclusive of all product types received from CFBNJ, (i.e., TEAP, SFP, and warehouse reports) as close to a requirement of your membership. Please submit the following information below by the 7th day of the following month for EACH program registered with the FoodBank, (i.e., January's report would be due on February 7th). The reports can be emailed to Network Relations at PartnerReporting@cfbnj.org.

Month / Year: August/2024

Agency ID Number (i.e. A0001-01): A1234-01

Agency Name: CFBNJ Test Environment Email: CFBNJ@usis@gmail.com

Contact Name: Service Insights Phone: _____

A. Pantry Programs & Other Non-Meal Distributions

CFBNJ Signature Sheet SFP Signature Sheet TEAP Signature Sheet

Number of Adults (over 18) served during the month: 3 0 0

Number of Children (under 18) served during the month: 3 0 0

Total Number of persons served during the month: 6 0 0

Total Number of Households served during the month: 2 0 0

B. On-Premise/Congregate Feeding Programs Agency ID: A1234-01
(Soup Kitchens, Group Homes, Shelters, After school programs)

1. Total Number of meals served: 0 (include snacks)

o Number of breakfasts: 0

o Number of lunches: 0

o Number of dinners: 0

o Number of snacks: 0

2. Number of home delivered meals: 0

2. Total Number of meals provided: 0

Please indicate any program changes such as a new director, contact person, change in address, phone number or new shoppers.