

SOP: Managing TEFAP Intake and Proxy Form(S) in Oasis

Table of Contents

Section 1: General TEFAP Intake & Proxy Requirements (1)

Section 2: Creating Federal Intake & Proxy Forms on Oasis (2-7)

- Completing a New Neighbor's Release of Information (ROI) (2-4)
- Completing a Proxy Form on Oasis (5-7)

Section 3: Saving PDFs of Neighbors' Federal Intake & Proxy Forms (8-11)

- Download & Saving a Neighbor's Proxy Form (8)
- Bulk Printing Federal Intake Forms (9-11)

Section 4: General Annual TEFAP & Proxy Recertification Requirements (12)

Section 5: Annual TEFAP & Proxy Recertification in Oasis (13-17)

- Neighbor Information Reverification (13-15)
- Neighbor ROI Renewal (15)
- Proxy Reverification (16 & 17)

Section 5: Other Ways to Track The Status of a Proxy Form in Oasis (18-21)

- Adding Case Alerts (18 & 19)
- Editing the Proxy Demographic Field in the Intake Form (20 & 21)

Section 6: Terminating a Proxy in Oasis (22-26)

- Adding a Note to a Proxy Form (22 & 23)
- Editing the Proxy Case Alert (24 & 25)
- Changing the Proxy Demographic Field in the Intake Form (26)

Section 1: General TEFAP Intake & Proxy Requirements

All Neighbors receiving TEFAP/USDA food from a Partner that request to assign a Proxy in their absence must complete a TEFAP Proxy Form as well as a Federal Intake Form, in-person, at the Partner’s distribution site. Both forms must remain on file for 3 years with the Partner, and new forms must be completed by the Neighbor and Proxy every 365 days.

EMERGENCY FOOD REGISTRATION FORM

Intake Information

Clients must be residents of the State of New Jersey

Date: _____ LDA _____ EFO _____

Name (Print): _____ Birthdate: _____

Street Address: _____ Town & zip code: _____

Phone #: _____ E-mail: _____

Number of adults in household: _____ Number of children under 18 in household: _____

QUALIFYING REASON (PLEASE CIRCLE)

1. TANF (Temporary Assistance for Needy Families – Social Services Program)

2. SNAP/Food stamps - Ran out/insufficient Lost Stolen Not received

3. SSI (Supplemental Security Income) – NOT SOCIAL SECURITY

4. WIC (Women, Infants, and Children)

5. MEDICAID

6. LOW INCOME (185% of poverty)- SELF DECLARATION

7. DISASTER (Other – can be divorce, domestic violence, unusual expense, loss of employment, etc.)

Please explain: _____

I am accepting a charitable donation of food from the Emergency Food Pantry. I hereby relinquish the Food Pantry of all liability of any nature whatsoever and accept the food products “as is” and at my own risk.

“I certify that my total yearly gross household income is at or below 185% of the poverty level, OR that my household participates in the program(s) that I have checked on the Emergency Food Registration Form. I will also notify the Pantry, if there are changes to my income or qualifiers which may cause me to become ineligible for the TEFAP foods.”

CLIENT SIGNATURE _____ DATE: _____

Interviewer Name: _____

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA’s TARGET Center at (202) 726-2668 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <https://www.usda.gov/sites/default/files/documents/USDA-CASCR%20Complaint-Form-0508-0007-508-11-28-17FasMail.pdf>, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant’s name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. mail:
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20258-5410; or

2. fax:
(833) 256-1665 or (202) 696-7442; or

3. email:
program.intake@usda.gov

This institution is an equal opportunity provider.
9/6/2022

THE EMERGENCY FOOD ASSISTANCE PROGRAM (TEFAP)

Proxy Form / Formulario De Poder

I give my permission for the undersigned to sign for receipt of my TEFAP commodities, due to my inability to pick up my TEFAP commodities.

Doy permiso para que la persona abajo firmante, firme la aceptacion de mis productos debido a mi incapacidad para recogerlos

Client / Cliente	Proxy / Apoderado
_____	_____
Print name of client Nombre impreso del cliente	Print name of Proxy Nombre impreso del destinatario
_____	_____
Signature of Client Firma del cliente	Signature of Recipient Firma del destinatario
_____	_____
Date / Fecha	Relationship / Relacion
_____	_____
Account #	Pantry

Click here to access a downloadable copy of the Federal Form.

Click here to access a downloadable copy of the TEFAP Proxy Form.

Completing a New Neighbor’s Release of Information (ROI)

For Partners using Oasis Insight (Oasis) for their Neighbor intake, both the Neighbor’s Federal Intake Form(s) and TEFAP Proxy Form(s) can be completed digitally. This process involves the Neighbor signing Oasis’s Release of Information (ROI) and the Proxy signing the Proxy Form within the TEFAP section of the Neighbor’s case. Partners using Oasis are required to save PDF copies of each neighbor’s Federal Intake Form(s) and Proxy Form(s). Both Forms must be preserved for 3 years and saved on an on site computer to be compliant.

1. Within a Neighbor’s “Case”, there will be a Red, Yellow, and Green Bar present at the top of the screen. The Yellow Bar indicates that the Neighbor’s ROI is not on file OR that their ROI has expired. If the Neighbor has never signed the ROI before, the text will state “Create New ROI”. Click on “Create New ROI”.

Only agents from CFBNJ Test Environment can view this case and anything added.

A release of information is required to share anything other than this case name, address and phone number with other agencies.

Create New ROI

Personal Info for Martin Prince

Address:	31 Evans Terminal Hillside, NJ 07205	Mailing Address:	Not Provided
County:	Union	Maiden:	Not Provided
DOB:	Not Provided		
Case #:	C374/32		
Phone:	Not Provided		
		Total Living In Household:	3
		Agency Last Assistance:	None
		Network Last Assistance:	None

EDIT CASE

***If the ROI is expired, the text will say “Renew ROI”. Pages 12-14 provide instructions on how to properly recertify a Neighbor with an expired ROI.**

2. A new screen will appear labeled “New Release of Information”. The date will automatically be set to the current date. Under “Cases To Include”, the Neighbor’s name will be selected. Click on “Next”.

New Release of Information

Date *

11 - 14 - 2024

Cases To Include

☒ Martin Prince (signing)


Once the new release of information form has been signed and verified it will be valid for a minimum of 365 days.

Next **Cancel**

Completing a New Neighbor’s Release of Information (ROI)

3. The ROI will appear. After the Neighbor agrees to the terms of the document, press on the yellow bar at the bottom of the screen labeled “Click Here for Digital Signature”.

English | Spanish



Oasis Assistance Network
Client Consent Form
CFBNJ Test Environment

In exchange for receiving assistance, I acknowledge, consent to and certify the following:
I am accepting a charitable donation of food from the indicated Emergency Food Parity. I hereby relinquish this agency and the Community Food Bank of New Jersey of all liability of any nature whatsoever and accept the food "As Is" and at my own risk.

My yearly gross household income is at or below 185% of poverty as indicated on the Income Eligibility Guidelines provided to me. OR my household participates in the program(s) I have indicated during the intake process; all other information given during the intake process is true and correct.

My household and assistance information will be shared through an electronic database known as "Oasis Insight" with the Community FoodBank of New Jersey ("Food Bank"). I understand that while ordinarily available only to the indicated Emergency Food Parity, my information may be shared with other agencies within the Food Bank network.

Food is provided on a "first come, first served" basis. There is no guarantee of the amount or type of food product given. I will not sell the food or non-food products or exchange or barter the food or non-food products received for services.

Inappropriate behavior such as profanity, littering, verbal abuse of staff/volunteers or any other disruptive behavior is prohibited. Any such behavior may result in the suspension or termination of my privileges at this Emergency Food Parity.

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <https://www.usda.gov/sites/default/files/documents/ad-3027.pdf>, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. mail: U.S. Department of Agriculture Office of the Assistant Secretary for Civil Rights 1400 Independence Avenue, SW Washington, D.C. 20250-9410; or 2. fax: (833) 256-1665 or (202) 696-7442; or 3. email: Program.intake@usda.gov

This institution is an equal opportunity provider.

☐ I give my consent to be contacted by the Food Bank to share my testimonial and highlight my hunger related experience.

This entire Client Consent Form will remain in effect for (1) year or until I make a written request to the Food Bank or Agency that I no longer wish to participate in Oasis Insight.

Client Name: Martin Polanco

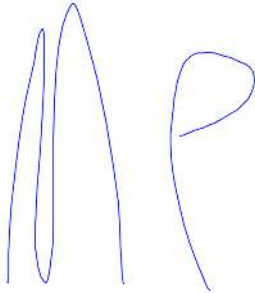
Date: 11/11/2024

Signature: X

Click Here for Digital Signature

4. A blank screen will appear stating “Sign Your Name Below”. Instruct the Neighbor to write their signature anywhere in the blank space. After the Neighbor signs the document, press “Submit Signature” at the bottom of the screen.

Sign Your Name Below



Submit Signature

Cancel

Clear

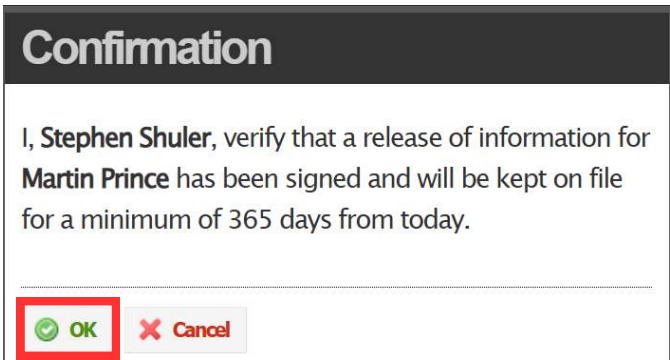
***If the Neighbor is physically unable to sign the ROI. The Partner must ask the Neighbor for their consent to sign on their behalf.**

Completing a New Neighbor’s Release of Information (ROI)

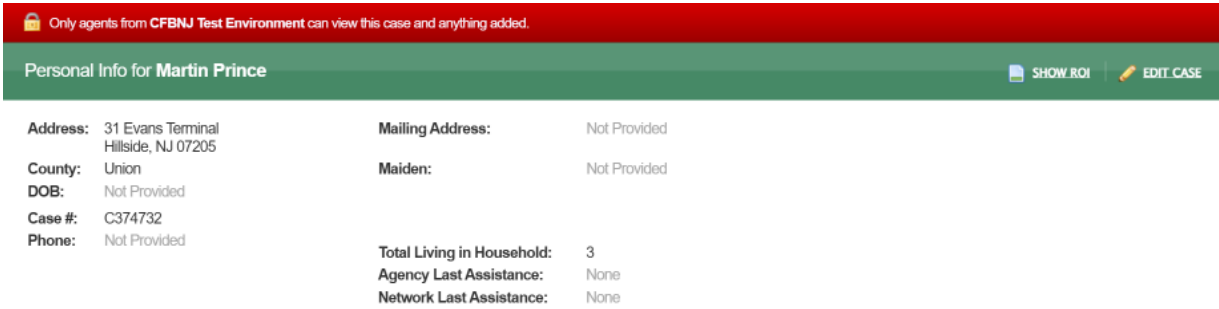
5. The Neighbor’s signature has been recorded, but the ROI has not been created. To create the ROI, click on “Verify ROI” at the top right of the screen.



6. Oasis will ask the Agent, the person currently intaking the Neighbor, to confirm that the ROI has been signed. Press “OK” after confirming that the correct Agent is logged in.



7. The ROI has been signed, and the Yellow ROI alert bar has disappeared. This bar will reappear 60 days prior to the ROI’s expiration date, alerting the Partner that they will need to recertify the Neighbor prior to the expiration date.



Completing a Proxy Form on Oasis

1. When a Neighbor requests to add a Proxy, first the Partner must access the Neighbor’s Case in Oasis. Within their Case, click on the black tab labeled “TEFAP” at the bottom right of the screen.

Only agents from CFBNJ Test Environment can view this case and anything added.

Personal Info for Martin Prince SHOW ROI EDIT CASE

Address: 31 Evans Terminal
Hillside, NJ 07205
County: Union
DOB: Not Provided
Case #: C374732
Phone: Not Provided

Mailing Address: Not Provided
Maiden: Not Provided

Total Living in Household: 3
Agency Last Assistance: None
Network Last Assistance: None

Details: How many Children (ages 17 and under) are in your Household?: 1
Qualifying Reason: Do You CURRENTLY Receive Any Of The Services Listed In Numbers 1 Through 5? If So, Please Choose Which Services. If Not, Do You Qualify For Reason 6 Or 7? Please Do Not Mark "N/A" Unless Told: 3 - SSI (Supplemental Security Income) - NOT SOCIAL SECURITY

How many Total Adults (ages 18 and over) are in your Household?: 2
Of those Adults, how many of them are over the age of 60?: 0

History of Modifications

Modified by Stephen Shuler from CFBNJ Test Environment Thu, Nov 14, 2024 at 11:20 a.m.

Demographic added
How many Total Adults (ages 18 and over) are in your Household?: 2

Demographic added
Appointment Scheduled:

Demographic added
Comments:

Demographic added
Documents Reviewed By:

Demographic added
Dietary Restrictions:

Demographic added
Number of Pets in the Household: None

Demographic added
Proxy: Would you like to add someone to your account that is authorized to pick up for you?:

Martin Prince
HEAD OF HOUSEHOLD
31 Evans Terminal
Hillside, NJ 07205
SHOW ON MAP

Case # — C374732
How many Children (ages 17 and under) are in your Household? — 1
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? —

Personal Info 0
Assistance 0
Relationships 2
Notes 0
Documents 0
Alerts 0
Appointments 0
TEFAP 0

***Depending on the size of the computer screen you are using, the TEFAP tab may not be visible. If it is not visible, scroll down to the bottom right of the Neighbor’s Case until it appears.**

2. Within the “TEFAP” tab, click on “ADD FORM”.

Only agents from CFBNJ Test Environment can view this case and anything added.

TEFAP Forms for Martin Prince ADD FORM

Show tefap forms for... ☒ Martin Prince ☒ Living with ☐ Related

[Add your first TEFAP Form](#)

Within this tab you can create and view all TEFAP Forms for Martin. In addition, you can view TEFAP Forms for anyone related to or living with Martin.

Completing a Proxy Form on Oasis

3. A screen labeled “TEFAP Application” will appear. Fill out the sections “Proxy: Would you like to add someone to your account that is authorized to pick up for you?” and “Proxy Relationship”. Press “Save & Close” once finished.

TEFAP Application – TEFAP Application

TEFAP Application

Proxy: Would you like to add someone to your account that is authorized to pick up for you?

Carl Carlson

Proxy Relationship

Care Taker

Notes

[Edit Entry Date/Time](#) — Nov 14, 2024 at 12:20 p.m.

Save & Close

Cancel

4. You will be redirected to the “TEFAP Forms” tab. A form has been added to the Neighbor’s Case. In order for the Proxy to sign the Proxy Form, click on “CAPTURE SIGNATURES”.

Stephen Shuler

CFBNJ Test Environment

Thu, Nov 14, 2024 at 12:20 p.m. | [EDIT](#) | [DELETE](#)

No notes

TEFAP Application

for [Martin Prince](#)

⚠ ATTENTION — No signature(s) recorded

[SHOW TEFAP FORM FIELDS](#)

[PROXY FORM \(PDF\)](#)

[CAPTURE SIGNATURES](#)

[TEFAP APPLICATION \(PDF\)](#)

[SHOW \(2\) MODIFICATIONS](#)

[EDIT TEFAP FORM](#)

5. You will be redirected to a page labeled “TEFAP Application - Signatures”. Under the Proxy’s name, press “Click here for digital signature”.

TEFAP Application — Signatures

Proxy — Carl Carlson

[Click here for digital signature](#)

Completing a Proxy Form on Oasis

6. Have the Proxy write their signature in the blank portion of the screen. Once finished, press “Submit Signature”.

Sign Your Name Below

Proxy Name

Carl Carlson



Submit Signature

Insert "COVID-19" Signature

Cancel

Clear


7. The signature will now be connected to the Proxy. To view a PDF version of the Proxy Form, first click “Go Back” at the top left of the screen.

Go Back

TEFAP Application — Signatures

Print

Proxy Signature




Printed Name: Carl Carlson

Date: November 14th 2024

Re-Sign

Delete Signature


8. Within the “TEFAP Application”, click on “PROXY FORM (PDF)” to be redirected to a PDF version of the Neighbor’s Proxy Form.


 **Stephen Shuler**
CFBNJ Test Environment


Thu, Nov 14, 2024 at 12:20 p.m. | [EDIT](#) | [DELETE](#)


No notes


TEFAP Application
for [Martin Prince](#)


 SHOW TEFAP FORM FIELDS

 **PROXY FORM (PDF)**

 CAPTURE SIGNATURES

 TEFAP APPLICATION (PDF)

 SHOW (2) MODIFICATIONS

 EDIT TEFAP FORM

Download & Saving a Neighbor's Proxy Form

1. Within the “TEFAP Application”, click on “PROXY FORM (PDF)” to be redirected to a PDF version of the Neighbor's Proxy Form.

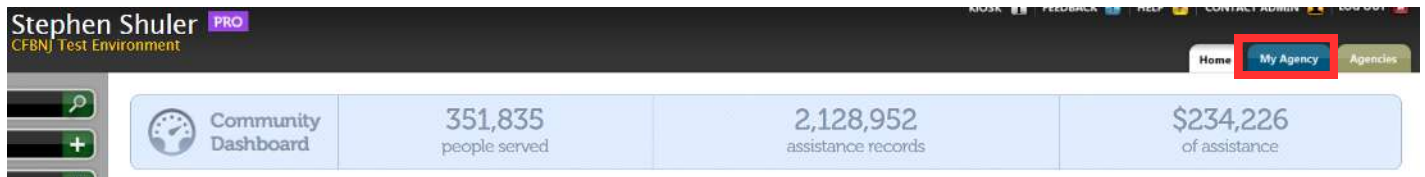
***From this screen, you can download this specific Neighbor's Federal Intake Form by clicking “TEFAP APPLICATION (PDF)”. Pages 9-11 provide instructions for how Partners can bulk save their Neighbors' Federal Intake Forms.**

2. The Proxy Form will open in a new tab. Click on the download button at the top right of the screen to save a digital copy of the Proxy Form. Within the Partner's onsite computer, the Partner needs to create a folder with the current year + Proxy Forms in the title - i.e. “2024 Proxy Forms” and save all relevant Proxy Forms to that folder. The Partner will also need to rename the file to the date the form was signed + the last name of the Neighbor + Proxy Form - i.e. “11-14-2024 Prince Proxy Form”.

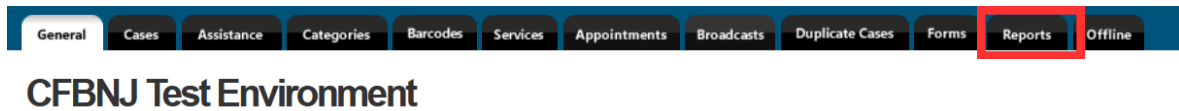
***The Neighbor's signature is automatically captured once they complete the ROI. If the signature of the Neighbor is not present, please verify if the Neighbor signed their ROI.**
***Each Proxy Form has to be manually downloaded. Currently, there is no way to bulk print Proxy Forms from Oasis.**

Bulk Printing Federal Intake Forms

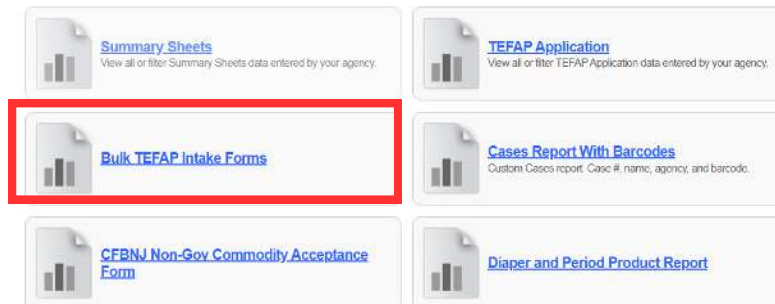
1. In addition to downloading copies of each Neighbor's Proxy Form, the Partner is also responsible for saving copies of each Neighbor's Federal Intake Form. While you can download each Neighbor's Federal Intake Form from the "TEFAP" tab within their cases, Oasis provides a way to bulk export all new Federal Intake Forms. To do so, click on "My Agency" at the top right of the screen.



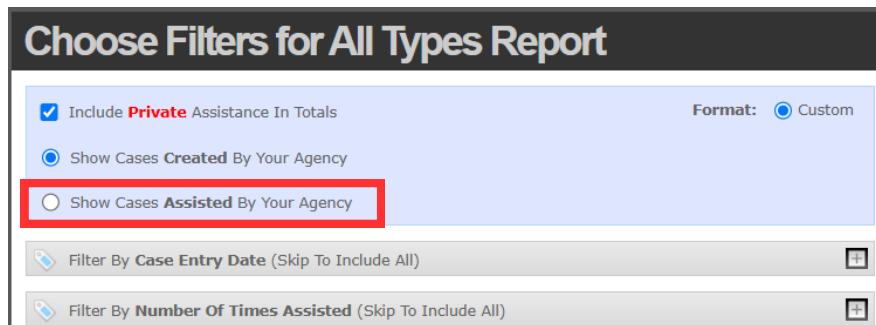
2. Click on the black tab labeled "Reports".



3. A list of reports will appear. Scroll down until you find the report labeled "Bulk TEFAP Intake Forms". Once found, click on "Bulk TEFAP Intake Forms".



4. The "Choose Filters for All Types Report" screen will appear. First, click on "Show Cases Assisted By Your Agency".



Bulk Printing Federal Intake Forms

5. Next, click on “Filter By Date of Assistance”. Two fields will appear. Enter the start and end date of the federal intake forms you would like to generate.

Choose Filters for All Types Report

☒ Include **Private** Assistance In Totals

Format: ☒ Custom

☐ Show Cases **Created** By Your Agency

☒ Show Cases **Assisted** By Your Agency

Filter By **Date Of Assistance** (Skip To Include All)

Choose Filters for All Types Report

☒ Include **Private** Assistance In Totals

Format: ☒ Custom

☐ Show Cases **Created** By Your Agency

☒ Show Cases **Assisted** By Your Agency

Filter By **Date Of Assistance** (Skip To Include All)

Start Date (MM-DD-YYYY)

End Date (MM-DD-YYYY)

11 - 14 - 2024

to

11 - 14 - 2024

***This report needs to be ran at minimum once per month. Ideally, Partners should run this report after every distribution.**

6. After entering the date range of the report, scroll down to the bottom of the page and press “Next”.

Filter By **Zip Code** (Skip To Include All)

Filter By **County** (Skip To Include All)

Filter By **Agent** (Skip To Include All)

Next

Cancel

7. After pressing “Next”, you will be redirected to the “Choose Fields for Report” screen. Click on “Request Report”.

Choose Fields for Report

Order By

Entry Date - First to Last

Custom Template

Bulk TEFAP Intake Forms

Back

Request Report

Cancel

Bulk Printing Federal Intake Forms

8. Once the report is finished loading, you will be redirected to a screen that states “Your Custom Report is Ready to Download”. From here, click on the **blue link** to open the PDF of your Neighbors' Federal Intake Forms.



Your Custom Report is Ready to Download

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

9. Your Neighbors' Federal Intake Forms will appear. Click on the download button at the top right of the screen to save a digital copy of the Federal Intake Forms. Within the Partner's onsite computer, the Partner needs to create a folder with the current year + Federal Intake Forms in the title - i.e. “2024 Federal Intake Forms” and save all relevant Federal Intakes Forms to that folder. The partner will also need to rename the file to the date/month the forms were signed + Federal Intake Forms - i.e. “11-14-2024 Federal Intake Forms”.

cfbnj2.oasisl... / 11-14-20...EY4STON

EMERGENCY FOOD REGISTRATION FORM
Intake Information

Clients must be residents of the State of New Jersey

Date: 11/14/24 LDA CFBNJ Test Environment EFO The Community Food Bank of NJ

Name (Print): Martin Prince Birthdate: _____

Street Address: 31 Evans Terminal Town & zip code: Hillside 07205

Phone #: _____ E-mail: _____

Number of adults in household: 2 Number of children under 18 in household: 1

QUALIFYING REASON (PLEASE CIRCLE)

1. TANF (Temporary Assistance for Needy Families – Social Services Program)
2. SNAP/Food stamps - ☐ Ran out/insufficient ☐ Lost ☐ Stolen ☐ Not received
- ☒ 3. SSI (Supplemental Security Income) – NOT SOCIAL SECURITY
4. WIC (Women, Infants, and Children)
5. MEDICAID
6. LOW INCOME (185% of poverty)- SELF DECLARATION
7. DISASTER (Other – can be divorce, domestic violence, unusual expense, loss of employment, etc.)

Please explain: _____

I am accepting a charitable donation of food from the Emergency Food Pantry. I hereby relinquish the Food Pantry of all liability of any nature whatsoever and accept the food products "as is" and at my own risk.

"I certify that my total yearly gross household income is at or below 185% of the poverty level, OR that my household participates in the program(s) that I have checked on the Emergency Food Registration Form. I will also notify the Pantry, if there are changes to my income or qualifiers which may cause me to become ineligible for the TEFAP foods."

CLIENT SIGNATURE MP DATE: 11/14/24

Interviewer Name: Stephen Shulev

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Document information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain

For a Neighbor to continue receiving food from a Partner, the Neighbor must be recertified every 365 days, based on the expiration date of the most recent Federal Intake Form that the Neighbor signed. During the Neighbor's recertification process, the Neighbor has to complete a new Federal Intake Form. If the Neighbor has a Proxy assigned to them, the Partner is required to verify with the Neighbor that the Neighbor would like to continue having their Proxy pickup for them. After confirming the continuation of the Proxy, the Neighbor and the Proxy must sign a new Proxy Form.

If the Neighbor would like to change their assigned Proxy during recertification, the Neighbor and the new Proxy will both need to sign a new Proxy Form at the Partner's facility.

If the Neighbor requests to terminate their Proxy's relationship, no new Proxy Form shall be provided to the Proxy or to the Neighbor. At this time, the Partner must record that the Neighbor no longer requires a Proxy to pick up on their behalf. Pages 22-26 provide a few examples for how a Partner on Oasis can indicate a Neighbor's termination/change in Proxy status.

If a Neighbor is no longer able to visit the partner in-person for their annual recertification, the Partner can complete the Neighbor's recertification with the Neighbor over the phone. During their phone/verbal recertification, the Partner must verify with the Neighbor if they would like to have their assigned Proxy continue picking up for them on their behalf. If so, the Proxy will need to sign a new Proxy Form the next time they are picking up for the Neighbor.

If the Neighbor requests to change their Proxy during their phone/verbal recertification, the Partner will need to mail the Neighbor a copy of the Proxy Form. The Partner must inform the Neighbor that the Neighbor and the new Proxy will need to sign and return the signed Proxy Form. The Proxy Form can be returned via mail or the new Proxy can drop off the Proxy Form to the Partner.

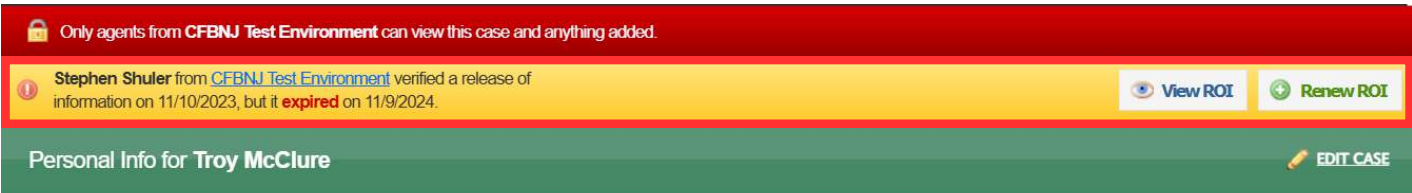
If an Individual is stating that they are the new Proxy for a registered Neighbor, the Partner shall not provide the Individual with a Proxy Form unless the Neighbor is with them, in-person, to confirm the Proxy's request.

Neighbor Information Reverification

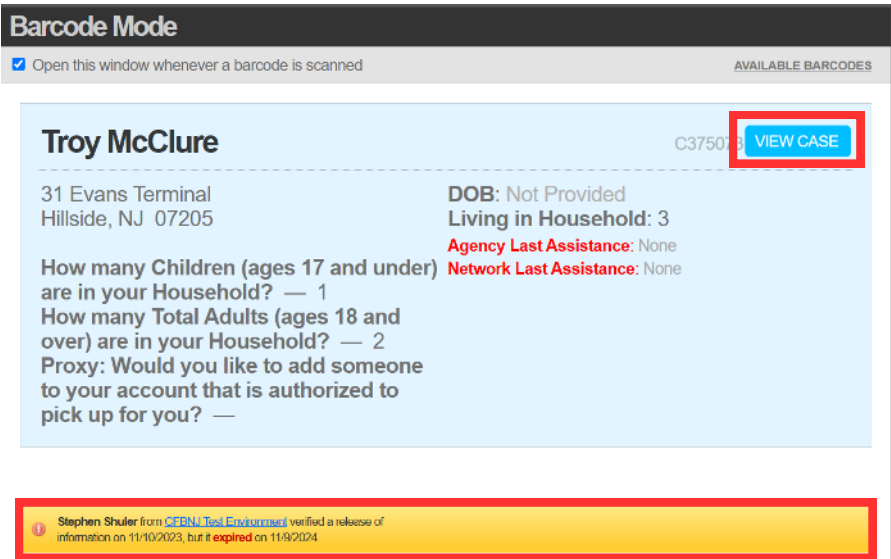
Oasis will inform the Partner when a Neighbor needs to recertify via the ROI functionality. 60 days prior to the ROI’s expiration, a yellow alert banner will appear at the top of the Neighbor’s Case, or below the Neighbor’s information if using the barcode mode. At this time, the Partner will need to confirm with the Neighbor that the information in their Case is still accurate. If not, the Partner must edit their Case and make the appropriate changes. After the Partner verifies the Neighbor’s information, the Neighbor needs to sign a new ROI.

***Any time a Neighbor needs to recertify their Federal Intake Form (or the ROI in the case of Oasis), the Partner also needs to recertify the Neighbor’s and Proxy’s status, even if the Proxy Form is not expired yet. Pages 16 & 17 go over how to recertify a Proxy in Oasis.**

- 1. When a Neighbor’s ROI is expired, this is an indication that 1. the Neighbor needs to have their information reverified 2. A new signature is required within the Neighbor’s Case 3. If the Neighbor has a Proxy Form on file, the Neighbor and Proxy will also need to re-sign the Proxy Form if the Neighbor wants to continue having the Proxy pick up for them.



- 1a. If your agency is providing Neighbors with barcodes, the yellow ROI alert will appear below the Neighbor’s information within the Barcode Mode. Press “VIEW CASE” to be redirected to the Neighbor’s Case in order to verify their information.



Neighbor Information Reverification

2. Prior to the Neighbor renewing their ROI, the Partner must verify with that Neighbor that the information within their Case is still valid. While their information is visible on the “Personal Info” tab of Oasis, CFBNJ recommends pressing “Edit Case” to see the complete version of the Neighbor’s Intake Form.

Only agents from CFBNJ Test Environment can view this case and anything added.

Stephen Shuler from CFBNJ Test Environment verified a release of information on 11/10/2023, but it expired on 11/9/2024.

View ROI

Renew ROI

Personal Info for Troy McClure

EDIT CASE

Address:	31 Evans Terminal Hillside, NJ 07205	Mailing Address:	Not Provided
County:	Union	Maiden:	Not Provided
DOB:	Not Provided		
Case #:	C375073		
Phone:	Not Provided	Total Living in Household:	3

3. After pressing “Edit Case”, the Neighbor’s Intake Form will appear. Only the following fields have to be reverified to fulfill the NJDA’s intake requirements: First Name, Last Name, Address, City, State, Zip Code, County, How Many Children Are In Your Household, How Many Total Adults Are In Your Household, and Qualifying Reason: Do You CURRENTLY Receive Any Of The Services Listed In Numbers 1 Through 5? If So, Please Choose Which Services. If Not, Do You Qualify For Reason 6 Or 7?

First Name *

Middle Name

Last Name *

Suffix

Troy

McClure

Street Address

Address *

Apt. #

31 Evans Terminal

City *

State *

Zip *

Hillside

NJ

07205

County *

Union

How Many Children (Ages 17 And Under) Are In Your Household? — Required

1

How Many Total Adults (Ages 18 And Over) Are In Your Household? — Required

2

Section 4: Annual TEFAP & Proxy Recertification In Oasis

Neighbor Information Reverification

Qualifying Reason: Do You CURRENTLY Receive Any Of The Services Listed In Numbers 1 Through 5? If So, Please Choose Which Services. If Not, Do You Qualify For Reason 6 Or 7? Please Do Not Mark "N/A" Unless Told —

Required (Select at least one)

- ☐ 1 - TANF (Temporary Assistance For Needy Families - Social Services Program)
- ☒ 2 - Food Stamps/SNAP (EBT Card)
- ☐ 3 - SSI (Supplemental Security Income) - NOT SOCIAL SECURITY
- ☐ 4 - WIC (Supplemental Nutrition Program For Women, Infants, And Children)
- ☐ 5 - Medicaid
- ☐ 6 - Low Income (185% Of Poverty)- SELF DECLARATION
- ☐ 7 - Disaster Or Special Circumstance (I.E. Divorce, Domestic Violence, Loss Of Employment, Etc.)

***All of the Neighbor’s information is Self-Declared; Partners are prohibited from asking Neighbors to provide proof of identification, address, income, etc.**

4. Once the necessary change are made, if any, to the Neighbor’s Case, click on “Save Changes” at the bottom left of the Intake Form.

Email Address

Save Changes

Cancel

Neighbor ROI Renewal

1. After verifying the Neighbor’s information, the neighbor must sign a new ROI. Click on “Renew ROI”.

Only agents from CFBNJ Test Environment can view this case and anything added.

Stephen Shuler from CFBNJ Test Environment verified a release of information on 11/10/2023, but it expired on 11/9/2024.

View ROI

Renew ROI

Personal Info for Troy McClure

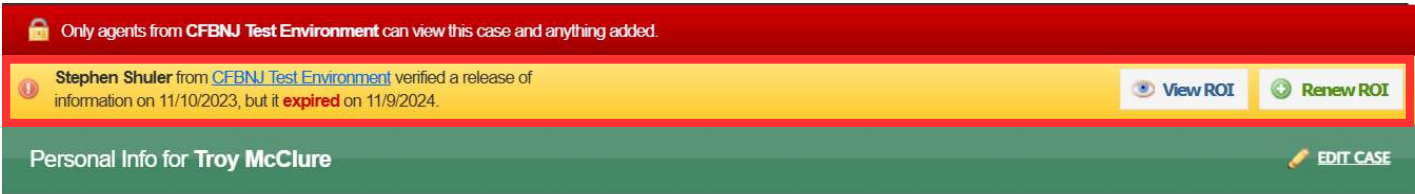
EDIT CASE

2. From here, the ROI renewal process is the same as if the Neighbor was newly added to Oasis. Follow steps 1-7 on pages 2-4 for guidance on how to have a Neighbor sign their ROI.

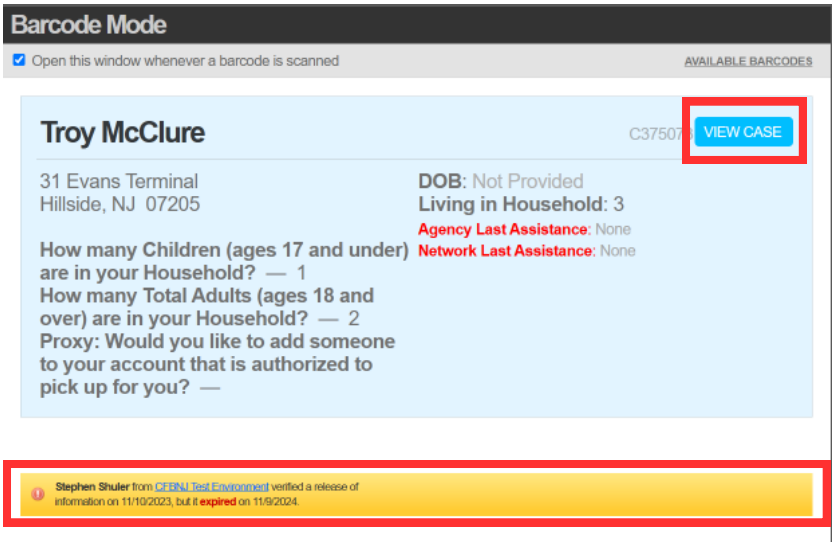
Proxy Reverification

If the Neighbor would like to continue having their Proxy pick up on for them on their behalf, the Proxy will need to sign a new Proxy Form every 365 days or whenever the Neighbor’s Federal Intake Form has expired. Partner can use the yellow ROI alert as an indication that a new Federal Intake Form and Proxy Form need to be signed.

- 1. When a Neighbor’s ROI is expired, this is an indication that 1. the Neighbor needs to have their information reverified 2. A new signature is required within the Neighbor’s Case. 3. A new Proxy Form needs to be signed, even if the Neighbor’s Proxy Form on file is not expired, by the Neighbor and Proxy.



1a. If your agency is providing Neighbors with barcodes, the yellow ROI alert will appear below the Neighbor’s information within the Barcode Mode. Press “VIEW CASE” to be redirected to the Neighbor’s Case in order to verify their information.



***In addition to the ROI alert, Partners can use Case Alerts and edit the Proxy Demographic field to record the Proxy Form’s expiration date. Instructions for how to use these two features can be found on pages 18-21 .**

Proxy Reverification

2. After verifying the Neighbor’s information and having them renew their ROI (as explained on pages 12-14), a new Proxy Form must be added to the Neighbor’s Case. Within the Neighbor’s Case, click on “TEFAP”.

Only agents from CFBNU Test Environment can view this case and anything added.

Personal Info for Troy McClure

SHOW ROI

EDIT CASE

Address:

31 Evans Terminal
Hillside, NJ 07205

County:

Union

DOB:

Not Provided

Case #:

C375073

Phone:

Not Provided

Mailing Address:

Not Provided

Maiden:

Not Provided

Total Living in Household:

3

Agency Last Assistance:

None

Network Last Assistance:

None

Details:

How many Children (ages 17 and under) are in your Household?: 1
Of those Adults, how many of them are over the age of 60?: 1

Of those Children, How Many of Them Are Younger Than 4 Years Old?: 0
Qualifying Reasons: Do You CURRENTLY Receive Any Of The Services Listed In Numbers 1 Through 5? If So, Please Choose Which Services. If Not, Do You Qualify For Reason 6 Or 7? Please Do Not Mark "N/A" Unless Told: 2 - Food Stamps/SNAP (EBT Card)

How many Total Adults (ages 18 and over) are in your Household?: 2

History of Modifications

Modified by Stephen Shuler from CFBNU Test Environment

Thu, Nov 14, 2024 at 3:47 p.m.

Demographic added
Of those Children, How Many of Them Are Younger Than 4 Years Old?: 0

Demographic added
Appointment Scheduled:

Demographic added
Comments:

Demographic added
Documents Reviewed By:

Demographic added
Dietary Restrictions:

Demographic added
Number of Pets in the Household: None

Demographic added
Proxy: Would you like to add someone to your account that is authorized to pick up for you? :

Demographic added

ADD PHOTO

Troy McClure

HEAD OF HOUSEHOLD

31 Evans Terminal
Hillside, NJ 07205

SHOW ON MAP

Case # — C375073

How many Children (ages 17 and under) are in your Household? — 1

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? —

Personal Info

Assistance0

Relationships2

Notes0

Documents0

Alerts0

Appointments0

TEFAP0

3. The Neighbor’s previous Proxy Form(s) will appear. **DO NOT** edit or delete any of the Neighbor’s Proxy Forms. To recertify the Proxy, the Partner will need to create a new Proxy Form. Press “ADD FORM” and follow steps 1-7 on pages 5-7 to create a new Proxy Form. Follow steps 1 and 2 on page 8 to download and save a PDF of the Neighbor’s new Proxy Form.

TEFAP Forms for Troy McClure

ADD FORM

Show tefap forms for...

☒ Troy McClure ☐ Living with ☐ Related

Stephen Shuler

CFBNU Test Environment

Fri, Nov 10, 2023 at 4:40 p.m. |

EDIT

DELETE

No notes

TEFAP Application for Troy McClure

SHOW TEFAP FORM FIELDS

PROXY FORM (PDF)

CAPTURE SIGNATURES

TEFAP APPLICATION (PDF)

SHOW (2) MODIFICATIONS

EDIT TEFAP FORM

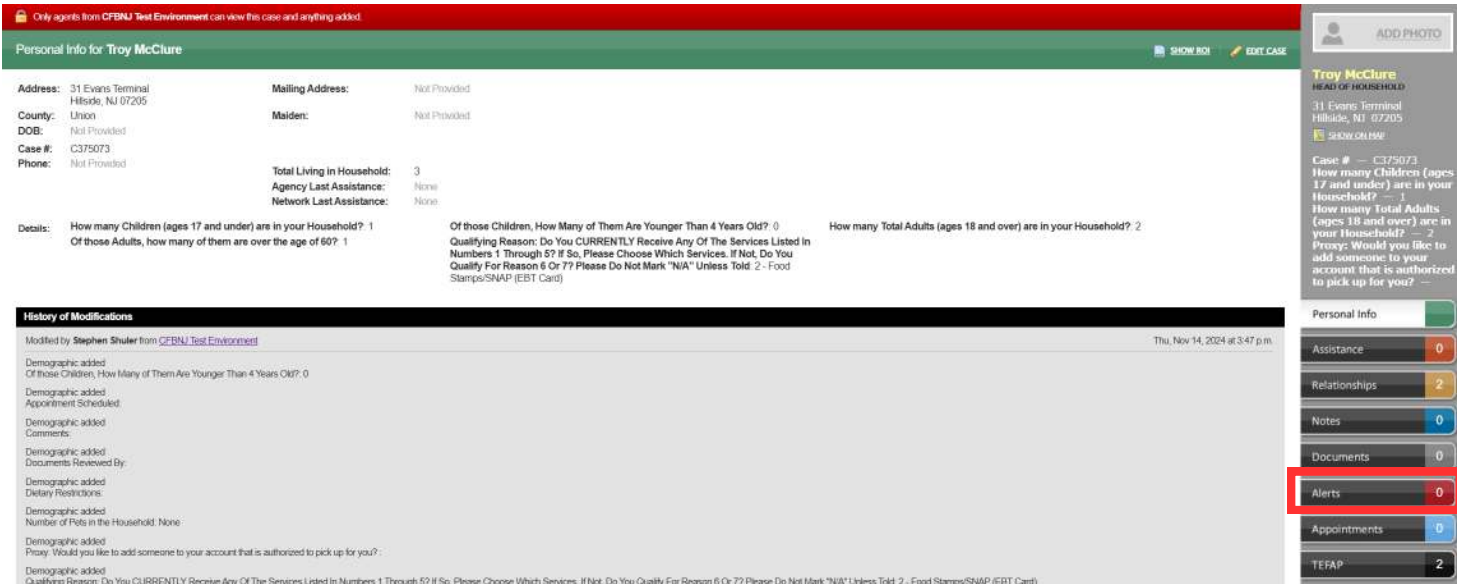
*Partners can only edit the Proxy Form to add a note to the Form. Steps to add a note can be reviewed on pages 22 & 23.

Adding Case Alerts

In addition to the ROI alert, partners are required to add a Case Alert to a Neighbor’s Case to indicate that a Proxy has been established. Case Alerts will create a note within the Neighbor’s Case. Within the Alert, the Partner must state that a Proxy has been assigned to the Neighbor, the name of the Proxy, and the expiration date of their Proxy Form. By using the Case Alert function, the Partner will be directed to the Neighbor’s “Alerts” section within their Case. If the Partner is using key tags or the Oasis generated ID cards, the alert will appear below the Neighbor’s information.

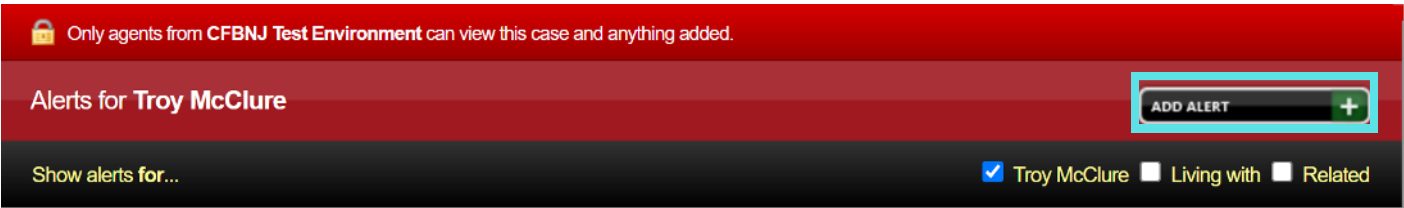
***In addition to using Alerts for the establishment of a Proxy, Alerts need to be used to record any changes to the Neighbor’s Proxy Status, including removal/termination of their Proxy. Pages 24 & 25 provide instructions on how to edit Alerts to record any changes to the Neighbor’s Proxy’s status.**

- 1. To add an Alert to a Neighbor’s Case, first access their Case. Once there, click on the red tab labeled “Alerts” at the bottom right of the screen.



***Depending on the size of the computer screen you are using, the Alerts tab may not be visible. If it is not visible, scroll down to the bottom right of the screen until it appears.**

- 2. Click on “ADD ALERT” to create an Alert.



Adding Case Alerts

3. The “Add Alert” screen will appear. Fill out the information regarding the Proxy arrangement including the name of the Proxy, the date the Proxy Form was signed, and the expiration date of the Proxy Form. Once finished, press “Add Alert”.

Add Alert

Description *

Selma Bouvier has signed a proxy form on 11/14/24 to pick up for Troy McClure. Selma and Troy will need to sign a new Proxy Form on 11/14/25. |

☐ Send email alert to CFBNJ Test Environment?

Add Alert

Cancel

***If “Send email alert to YOUR AGENCY NAME” is checked off, all agents within the Partner’s agency labeled Agency Administrator will receive an email that a Case Alert has been added to the Neighbor’s Case.**

4. The Case Alert has been added. Whenever the Neighbor’s Case is opened, Oasis will direct the Partner to the “Alerts” tab within the Case.

Alerts for Troy McClure

ADD ALERT

Show alerts for...

☒ Troy McClure ☐ Living with ☐ Related

Stephen Shuler

CFBNJ Test Environment

Thu, Nov 14, 2024 at 5:30 p.m. | EDIT | DELETE

Selma Bouvier has signed a proxy form on 11/14/24 to pick up for Troy McClure. Selma and Troy will need to sign a new Proxy Form on 11/14/25.

Alert added for [Troy McClure](#)

4a. If the Partner provides barcodes to their Neighbors, the Case Alert will appear in the Barcode Mode Window when scanned, below the Neighbor’s information.

Troy McClure

C375073 VIEW CASE

31 Evans Terminal
Hillside, NJ 07205

DOB: Not Provided
Living in Household: 3
Agency Last Assistance: None
Network Last Assistance: None

How many Children (ages 17 and under) are in your Household? — 1

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? —

Case Alerts

Selma Bouvier has signed a proxy form on 11/14/24 to pick up for Troy McClure. Selma and Troy will need to sign a new Proxy Form on 11/14/25.

Thu, Nov 14, 2024 at 5:30 p.m. • Stephen Shuler at CFBNJ Test Environment

Editing the Proxy Demographic Field in the Intake Form

While less visible than a Case Alert, the demographic field “Proxy: Would you like to add someone to your account that is authorized to pick up for you?” can also be used to indicate that a Proxy has been established, changed, or removed (terminated). To use the field, the Partner needs to edit the field within the Neighbor’s Oasis Intake Form.

- 1. Within the Neighbor’s Case, click on “EDIT CASE” to access their Oasis Intake Form.

Only agents from CFBNJ Test Environment can view this case and anything added.

Personal Info for Troy McClure

SHOW ROI

EDIT CASE

Address:

31 Evans Terminal
Hillside, NJ 07205

Mailing Address:

Not Provided

County:

Union

Maiden:

Not Provided

DOB:

Not Provided

Case #:

C375073

Phone:

Not Provided

- 2. Towards the bottom of the form, there is a field called “Proxy: Would you like to add someone to your account that is authorized to pick up for you?”. In this field, write the name of the Proxy as well as the expiration date of their proxy form. Once finished, press “Save Changes”.

Proxy: Would You Like To Add Someone To Your Account That Is Authorized To Pick Up For You?

Selma Bouvier (EXP. 11/14/25)

Neighbor Signed A Paper Federal Intake Form

☐ Yes

What Is Your Preferred Language?

▼

Consents To Receiving Text Messages

☐ Yes

☐ No

Email Address

Save Changes

Cancel

◀

▶

Proxy: Would You Like To Add Someone To Your Account That Is Authorized To Pick Up For You?

Selma Bouvier (EXP. 11/14/25)

Neighbor Signed A Paper Federal Intake Form

☐ Yes

What Is Your Preferred Language?

▼

Consents To Receiving Text Messages

☐ Yes

☐ No

Email Address

Save Changes

Cancel

◀

▶

3. Within the Neighbor’s Case, the Proxy’s name will be present in two locations: to the right of “Details” and in the gray section at the right of the screen, above the “Personal Info” tab.

Only agents from CFBNJ Test Environment can view this case and anything added.

Personal Info for Troy McClure

SHOW ROIEDIT CASE

Address:31 Evans Terminal Hillside, NJ 07205

County:Union

DOB:Not Provided

Case #:C375073

Phone:Not Provided

Mailing Address:Not Provided

Maiden:Not Provided

Total Living in Household:3

Agency Last Assistance:None

Network Last Assistance:None

Details:

How many Children (ages 17 and under) are in your Household?: 1

Of those Children, how many of them are over the age of 60?: 1

Of those Children, How Many of Them Are Younger Than 4 Years Old?: 0

Qualifying Reason: Do You CURRENTLY Receive Any Of The Services Listed In Numbers 1 Through 5? If So, Please Choose Which Services. If Not, Do You Qualify For Reason 6 Or 7? Please Do Not Mark "N/A" Unless Told: 2 - Food Stamps/SNAP (EBT Card)

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? : Selma Bouvier (EXP: 11/14/25)

ADD PHOTO

Troy McClure

HEAD OF HOUSEHOLD

31 Evans Terminal Hillside, NJ 07205

SHOW ON MAP

Case # — C375073

How many Children (ages 17 and under) are in your Household? — 1

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? — Selma Bouvier (EXP: 11/14/25)

Personal Info

Assistance0

History of Modifications

Modified by Stephen Shuler from CFBNJ Test Environment

Thu, Nov 14, 2024 at 5:49 p.m.

Demographic changed

3a. If the Partner provides barcodes to their Neighbors, the Proxy’s name will appear in the Barcode Mode Window when scanned, below the Neighbor’s Name.

Troy McClure

C375073VIEW CASE

31 Evans Terminal Hillside, NJ 07205

DOB: Not Provided

Living in Household: 3

Agency Last Assistance: None

Network Last Assistance: None

How many Children (ages 17 and under) are in your Household? — 1

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? — Selma Bouvier (EXP: 11/14/25)

Adding a Note to a Proxy Form

If a Neighbor has requested that their Proxy be unassigned from their Case or there is a situation that requires a Partner to unassign the Proxy, the Partner must not delete the Proxy Form from Oasis. If the Proxy needs to be removed, the Partner must add a note to the Proxy Form and edit the Case Alert to reflect the Proxy’s termination.

1. If a Proxy is being removed from a Neighbor’s Case, a Note can be added to their Proxy Form. Within their Case, click on the black tab labeled “TEFAP” at the bottom right of the screen.

Only agents from CFBNJ Test Environment can view this case and anything added.

Personal Info for Martin Prince

Address: 31 Evans Terminal
Hillside, NJ 07205
County: Union
DOB: Not Provided
Case #: C374732
Phone: Not Provided

Mailing Address: Not Provided
Maiden: Not Provided

Total Living in Household: 3
Agency Last Assistance: None
Network Last Assistance: None

Details: How many Children (ages 17 and under) are in your Household?: 1
Qualifying Reason: Do You CURRENTLY Receive Any Of The Services Listed In Numbers 1 Through 5? If So, Please Choose Which Services. If Not, Do You Qualify For Reason 6 Or 7? Please Do Not Mark "N/A" Unless Told. 3 - SSI (Supplemental Security Income) - NOT SOCIAL SECURITY

How many Total Adults (ages 18 and over) are in your Household?: 2
Of those Adults, how many of them are over the age of 60?: 0

History of Modifications

Modified by Stephen Shuler from CFBNJ Test Environment Thu, Nov 14, 2024 at 11:20 a.m.

Demographic added
How many Total Adults (ages 18 and over) are in your Household?: 2

Demographic added
Appointment Scheduled:

Demographic added
Comments:

Demographic added
Documents Reviewed By:

Demographic added
Dietary Restrictions:

Demographic added
Number of Pets in the Household: None

Demographic added
Proxy: Would you like to add someone to your account that is authorized to pick up for you?:

Martin Prince
HEAD OF HOUSEHOLD
31 Evans Terminal
Hillside, NJ 07205
SHOW ON MAP

Case # — C374732
How many Children (ages 17 and under) are in your Household? — 1
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? —

Personal Info
Assistance 0
Relationships 2
Notes 0
Documents 0
Alerts 0
Appointments 0
TEFAP 0

2. A record of all of the Neighbor’s Proxy Forms will appear. If there are multiple Proxy Forms between the Neighbor and the same Proxy, the note only needs to be added to the most recent Proxy Form. To add the note, click on “EDIT”.

TEFAP Forms for Troy McClure

ADD FORM +

Show tefap forms for... ☒ Troy McClure ☒ Living with ☐ Related

Stephen Shuler
CFBNJ Test Environment
Thu, Nov 14, 2024 at 4:45 p.m. EDIT X DELETE

No notes

TEFAP Application
for Troy McClure

SHOW TEFAP FORM FIELDS PROXY FORM (PDF) CAPTURE SIGNATURES TEFAP APPLICATION (PDF)

SHOW (2) MODIFICATIONS EDIT TEFAP FORM

***The Partner must not delete any Proxy Forms from the Neighbor’s Case.**

Adding a Note to a Proxy Form

3. In the “Notes” section, provide a brief explanation regarding why the Proxy is being terminated, the date of termination, and the name of the Individual processing the termination. After adding the note, press “Save & Close”.

TEFAP Application – TEFAP Application

TEFAP Application

Proxy: Would you like to add someone to your account that is authorized to pick up for you?

Selma Bouvier

Proxy Relationship

Close Friend

Notes

On 11/20/2024, Troy McClure requested that Selma Bouvier be removed as his proxy - Stephen Shuler

[Edit Entry Date/Time](#) — Nov 14, 2024 at 4:45 p.m.

Save & Close

Cancel

4. There is now a record within the Neighbor’s Proxy Form regarding the termination/change of their Proxy.

TEFAP Forms for Troy McClure

ADD FORM

Show tefap forms for...

Troy McClure

Living with

Related

Stephen Shuler

CFBNJ Test Environment

Thu, Nov 14, 2024 at 4:45 p.m. | [EDIT](#) | [DELETE](#)

On 11/20/2024, Troy McClure requested that Selma Bouvier be removed as his proxy - Stephen Shuler

TEFAP Application

for Troy McClure

SHOW TEFAP FORM FIELDS

PROXY FORM (PDF)

CAPTURE SIGNATURES

TEFAP APPLICATION (PDF)

SHOW (2) MODIFICATIONS

EDIT TEFAP FORM

Editing the Proxy Case Alert

1. In addition to adding a note to the Proxy Form, Partners should record the termination of the Proxy in the Case Alert that originally indicated the establishment of the Proxy. To edit the Proxy Case Alert, first access their Case. Once there, click on the red tab labeled “Alerts” at the bottom right of the screen.

Only agents from CFBNJ Test Environment can view this case and anything added.

Personal Info for Troy McClure

SHOW INFO

EDIT CASE

Address: 31 Evans Terminal
Hillside, NJ 07205

Mailing Address: Not Provided

County: Union

DOB: Not Provided

Case #: C375073

Phone: Not Provided

Maiden: Not Provided

Total Living in Household: 3

Agency Last Assistance: None

Network Last Assistance: None

Details:

How many Children (ages 17 and under) are in your Household?: 1

Of those Adults, how many of them are over the age of 60?: 1

Of those Children, How Many of Them Are Younger Than 4 Years Old?: 0

Qualifying Reason: Do You CURRENTLY Receive Any Of The Services Listed In Numbers 1 Through 5? If So, Please Choose Which Services. If Not, Do You Qualify For Reason 6 Or 7? Please Do Not Mark "N/A" Unless Told. 2 - Food Stamps/SNAP (EBT Card)

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? : Selma Bouvier (EXP: 11/14/25)

Troy McClure

HEAD OF HOUSEHOLD

31 Evans Terminal
Hillside, NJ 07205

SHOW ON MAP

Case # — C375073

How many Children (ages 17 and under) are in your Household? — 1

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? — Selma Bouvier (EXP: 11/14/25)

Personal Info

Assistance 0

Relationships 2

Notes 0

Documents 0

Alerts 1

Appointments 0

History of Modifications

Modified by Stephen Shuler from CFBNJ Test Environment

Thu, Nov 14, 2024 at 5:49 p.m.

Demographic changed

Proxy: Would you like to add someone to your account that is authorized to pick up for you? : to Proxy: Would you like to add someone to your account that is authorized to pick up for you? : Selma Bouvier (EXP: 11/14/25)

Modified by Stephen Shuler from CFBNJ Test Environment

Thu, Nov 14, 2024 at 3:47 p.m.

Demographic added

How many Total Adults (ages 18 and over) are in your Household?: 2

Demographic added

Appointment Scheduled:

Demographic added

Comments:

Demographic added

Documents Reviewed By:

Demographic added

Dietary Restrictions:

Demographic added

Number of Pets in the Household: None

Demographic added

2. Within the Neighbor’s Alerts tab, locate the Alert related to the Neighbor’s Proxy. Once identified, click on “EDIT”.

Alerts for Troy McClure

ADD ALERT +

Show alerts for...

☒ Troy McClure ☐ Living with ☐ Related

Stephen Shuler

CFBNJ Test Environment

Thu, Nov 14, 2024 at 5:30 p.m.

EDIT

DELETE

Selma Bouvier has signed a proxy form on 11/14/24 to pick up for Troy McClure. Selma and Troy will need to sign a new Proxy Form on 11/14/25.

Alert added for [Troy McClure](#)

Editing the Proxy Case Alert

3. Within the Alert’s Description field, provide a brief explanation regarding why the Proxy is being terminated, the date of termination, and the name of the Individual processing the termination. After adding the description, press “Save changes”.

Edit Alert

Description *

11/20/24 - Troy McClure has requested that Selma Bouvier be removed as his Proxy - Stephen Shuler

Selma Bouvier has signed a proxy form on 11/14/24 to pick up for Troy McClure. Selma and Troy will need to sign a new Proxy Form on 11/14/25.

☐ Send email alert to CFBNJ Test Environment?

Save changes

Cancel

4. The Alert has been updated and the change will be reflected in both the “Alerts” tab as well as under the Neighbor’s Information when using the barcode mode.

Alerts for Troy McClure

ADD ALERT

Show alerts for...

☒ Troy McClure ☐ Living with ☐ Related

Stephen Shuler

CFBNJ Test Environment

Thu, Nov 14, 2024 at 5:30 p.m. | [EDIT](#) [DELETE](#)

11/20/24 - Troy McClure has requested that Selma Bouvier be removed as his Proxy - Stephen Shuler

Selma Bouvier has signed a proxy form on 11/14/24 to pick up for Troy McClure. Selma and Troy will need to sign a new Proxy Form on 11/14/25.

Alert added for [Troy McClure](#)

Barcode Mode

☒ Open this window whenever a barcode is scanned

AVAILABLE BARCODES

Troy McClure

C375073

VIEW CASE

31 Evans Terminal
Hillside, NJ 07205

DOB: Not Provided
Living in Household: 3
Agency Last Assistance: None
Network Last Assistance: None

How many Children (ages 17 and under) are in your Household? — 1

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? — Selma Bouvier (EXP. 11/14/25)

Case Alerts

11/20/24 - Troy McClure has requested that Selma Bouvier be removed as his Proxy - Stephen Shuler

Selma Bouvier has signed a proxy form on 11/14/24 to pick up for Troy McClure. Selma and Troy will need to sign a new Proxy Form on 11/14/25.

Thu, Nov 14, 2024 at 5:30 p.m. - Stephen Shuler at CFBNJ Test Environment

Changing the Proxy Demographic Field in the Intake Form

While editing the Proxy Form note and adjusting the description of the Proxy Case Alert are required, Partners are also encouraged to update the Proxy Demographic Field within the Neighbor’s Intake Form if the Neighbor requests their Proxy be changed or terminated.

- 1. Within the Neighbor’s Case, click on “EDIT CASE” to access their Oasis Intake Form.

Only agents from CFBNU Test Environment can view this case and anything added.

Personal Info for Troy McClure

SHOW ROI

EDIT CASE

Address:

31 Evans Terminal
Hillside, NJ 07205

Mailing Address:

Not Provided

County:

Union

DOB:

Not Provided

Maiden:

Not Provided

Case #:

C375073

Phone:

Not Provided

- 2. Towards the bottom of the form, locate the Demographic Field called “Proxy: Would you like to add someone to your account that is authorized to pick up for you?”. Edit the text in the current field to indicate the status change of the Proxy, including the date of the change and the individual processing the change. Press “Save Changes” when finished.

Proxy: Would You Like To Add Someone To Your Account That Is Authorized To Pick Up For You?

11/20/24: Troy McClure requested that Selma Bouvier be removed as their Proxy - SS

Neighbor Signed A Paper Federal Intake Form

☐ Yes

What Is Your Preferred Language?

▼

Consents To Receiving Text Messages

☐ Yes

☐ No

Email Address

Save Changes

Cancel