OASIS INSIGHT STEP BY STEP GUIDE

HOW TO GENERATE CFBNJ MONTHLY REPORTS:

CHROMEBOOK EDITION

For Government Qualified Partners

PART 1
Creating Folders to Organize Reports in Google Drive

PART 2
Creating and Downloading All 6 Monthly Reports

PART 3
Sending Reports to CFBNJ using Gmail

PART 4
Downloading and Saving Federal Intake Forms

PART 1: CREATING FOLDERS IN GOOGLE DRIVE

CFBNJ provides partners utilizing Oasis Insight for their intake and monthly reporting with Chromebooks. While Chromebooks function similar to other laptops, there are some differences. This first section will go over the process of creating multiple folders within Google Drive.
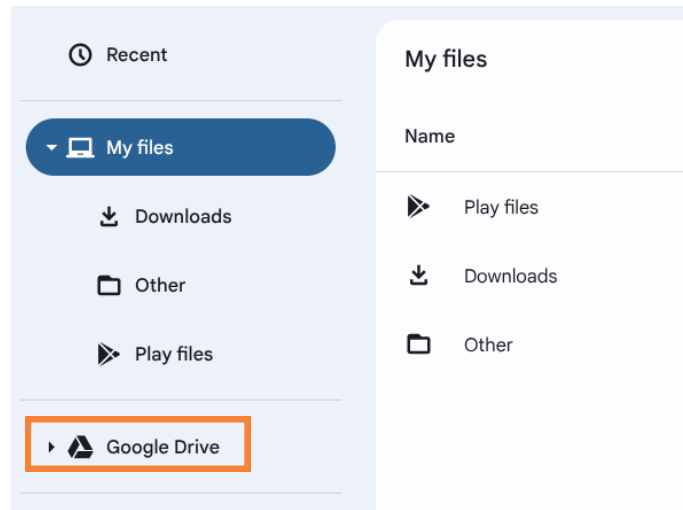
STEP 1

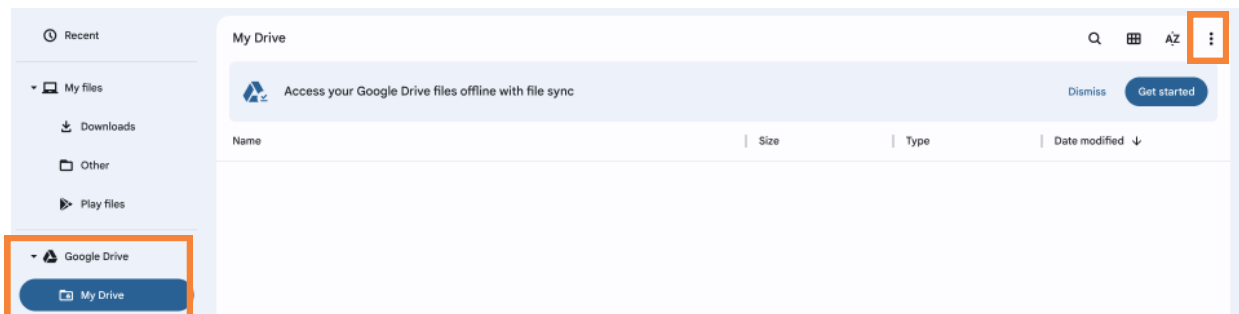At the bottom of Chromebook screen, click on 📁 to open the file explorer

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STEP 2

The file explorer will open. Click on ▸ 🔺 Google Drive

STEP 3

Google Drive will redirect you to 📁 My Drive . This is where a folder called "CFBNJ Reports" should be created. To create a folder, click on ⋮ at the top right of the screen.
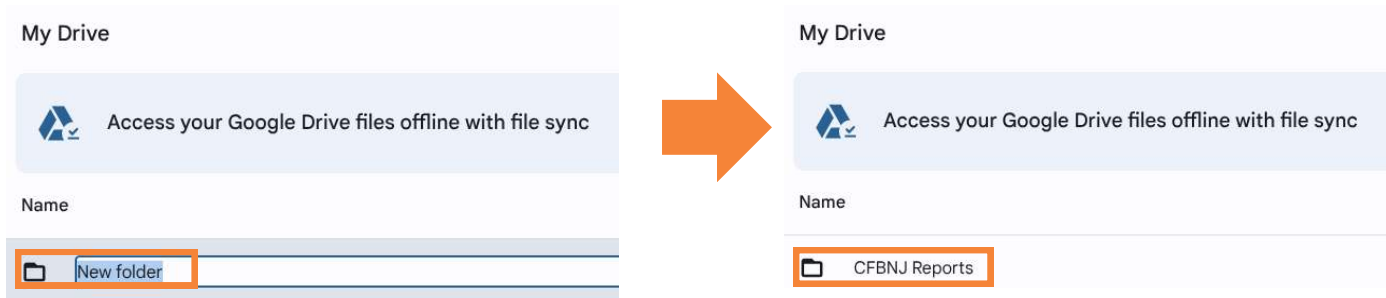

STEP 4

A window will pop up displaying several options. Press   New folder   Ctrl+E
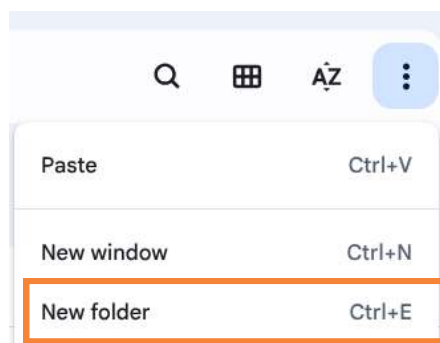
STEP 5

A new folder will be added. The folder name needs to be changed. Type in "CFBNJ Reports" where 📁 New folder **is. Press "Enter" on your keyboard to save the name of the folder.**


STEP 6

Open the new folder by double clicking on 📁 CFBNJ Reports **. Once opened, verify that the correct folder has been open. At the top of the screen, you should see** My Drive > CFBNJ Reports

Once verified, follow the previous steps to create 2 folders within 📁 CFBNJ Reports **. Each month, a folder should be created for the corresponding month's reports. We recommend labeling the folder using the template "MONTH-YEAR Monthly Reports" (i.e. 08-2025 Monthly Reports). Once a year, a folder should be created for the corresponding year's Federal Intake Forms. We recommend labeling the folder "YEAR Federal Intake Forms" (i.e 2025 Federal Intake Forms).**
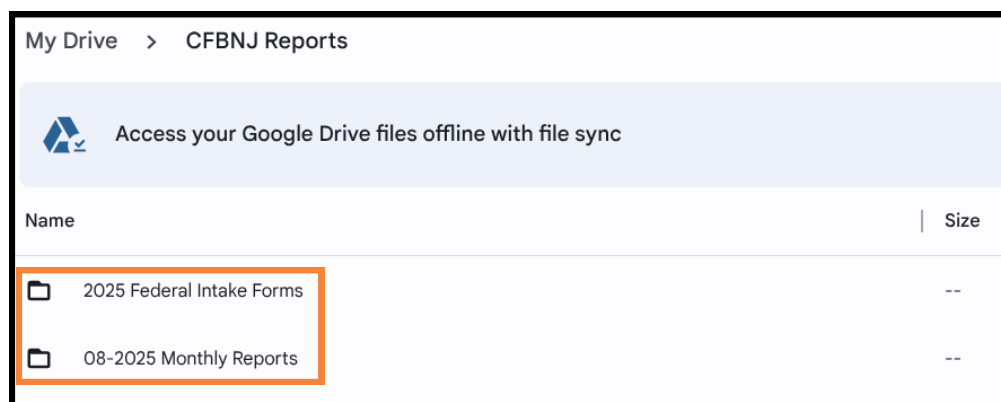
Whenever creating folders, downloading content, or moving files, it is a good idea to verify the file is in the correct area by looking at the folder names at the top of the file explorer.

PART 2: CREATING AND DOWNLOADING REQUIRED REPORTS

In this section, we will go over the step by step process for using the Gov-Qualified CFBNJ Monthly Reports shortcut that generates the CFBNJ Monthly Service Report, and TEFAP, SFPP & Non-Gov Commodity Sheets into one PDF. We will then go over how to download the document to the folders created in part 1. Afterwards, we will provide instructions on creating and downloading the TEFAP and SFPP Summary Sheets.
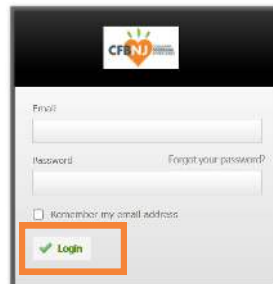
STEP 1

Open up Google Chrome by clicking [Chrome icon] at the bottom of the screen.

STEP 2

Type in **cfbnj2.oasisinsight.net** to access the Oasis login screen. After entering your email and password, press [Login]

STEP 3

Click the blue [My Agency] tab that is located at the top right corner of the page.
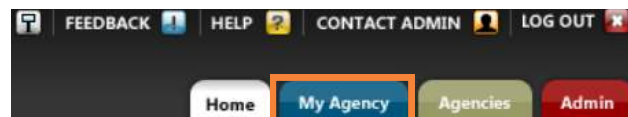
STEP 4

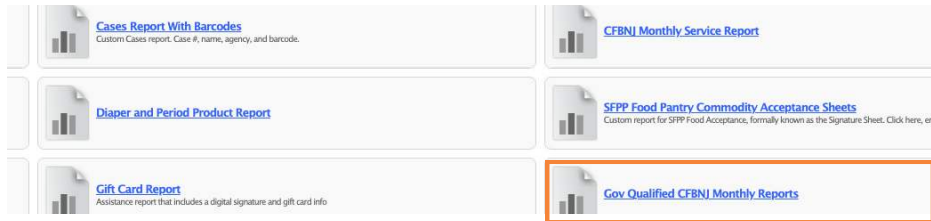At the top of the page, you will see a menu of black tabs. Click the [Reports] tab.

STEP 5

A list of various reports will appear. Scroll down until you see [Gov Qualified CFBNJ Monthly Reports] and then click.

Cases Report With Barcodes
Custom Cases report. Case #, name, agency, and barcode.

CFBNJ Monthly Service Report

Diaper and Period Product Report

SFPP Food Pantry Commodity Acceptance Sheets
Custom report for SFPP Food Acceptance, formally known as the Signature Sheet. Click here, ent

Gift Card Report
Assistance report that includes a digital signature and gift card info

Gov Qualified CFBNJ Monthly Reports

STEP 6

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)   End Date (MM-DD-YYYY)
[ ] – [ ] – [   ] to [ ] – [ ] – [   ]

☐ 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)   End Date (MM-DD-YYYY)
08 – 01 – 2025 to 08 – 31 – 2025

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

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 7

To begin generating your report, locate and click ✅ **Request Report**

Choose Fields for Report

Order Assistance By
[Oldest to Newest ▾]

Custom Template
[Gov Qualified CFBNJ Monthly Reports ▾]

⇐ Back   ✅ **Request Report**   ✖ Cancel

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

⬇ 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 8

The pdf will open. Scroll through to confirm all four reports are reflected.

STEP 9

To download the PDF, click on 🔽 at the top right of the screen.

STEP 10

The file explorer will open. The default selected folder is Downloads. To save the report to corresponding monthly folder, click on ▸ 🔺 Google Drive

STEP 11

Double click on ☐ CFBNJ Reports The two other folders will appear. Double click on the corresponding month's folder, such as ☐ 08-2025 Monthly Reports . Once in the folder, verify that you are in the correct folder by reviewing the top of the file explorer. It should have My Drive > CFBNJ Reports > and the Corresponding Months Report Folder listed.
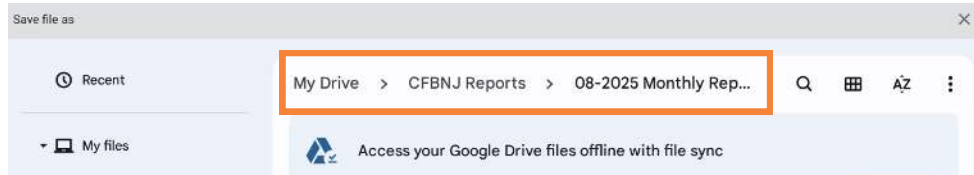
STEP 12

Click on the file to rename the file from the default name to the corresponding **Month + Year + Monthly Reports (i.e. 08-2025 Monthly Reports).** Once renamed, press [Save]
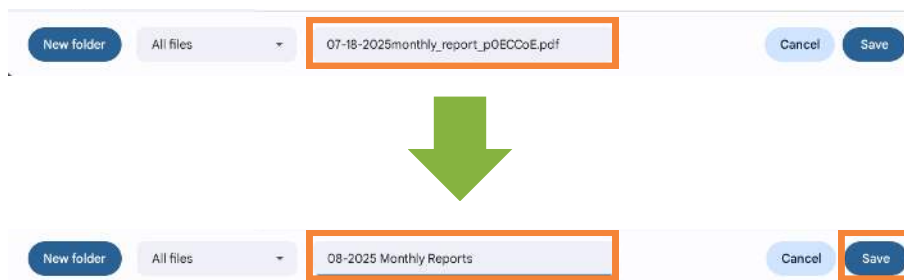
4 out of 6 of your reports have been downloaded to the Chromebook!

STEP 13

To generate the TEFAP and SFPP Summary Sheets through Oasis, first click on ← and then

⬅ Go Back to go back to Oasis.
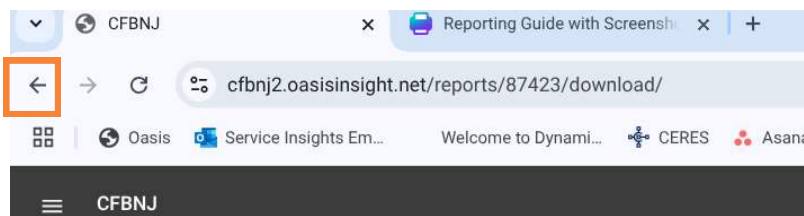
STEP 14

Return to the blue **My Agency** tab, and click the **Forms** tab located at the top of the page

After the Forms page opens, click **ADD FORM +** located at the top right of your screen.

STEP 15
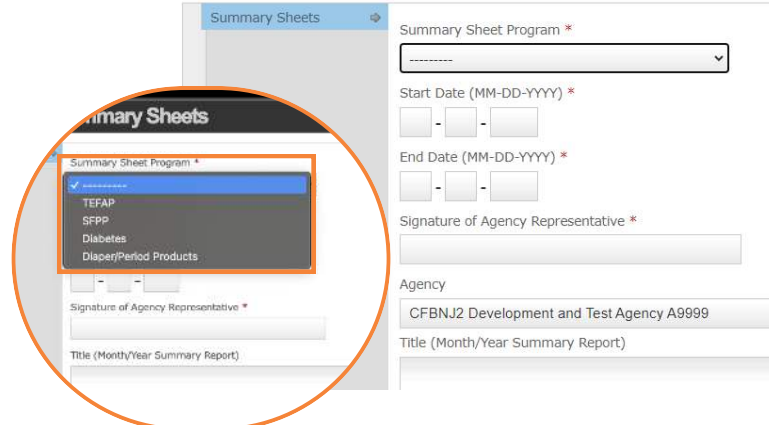
A new **Summary Sheets** window will open. Let's break down each of the required fields and what to expect.

Summary Sheet Program
Click the drop-down menu to select a program We will start with TEFAP, and then repeat the same process to create the SFPP summary report.

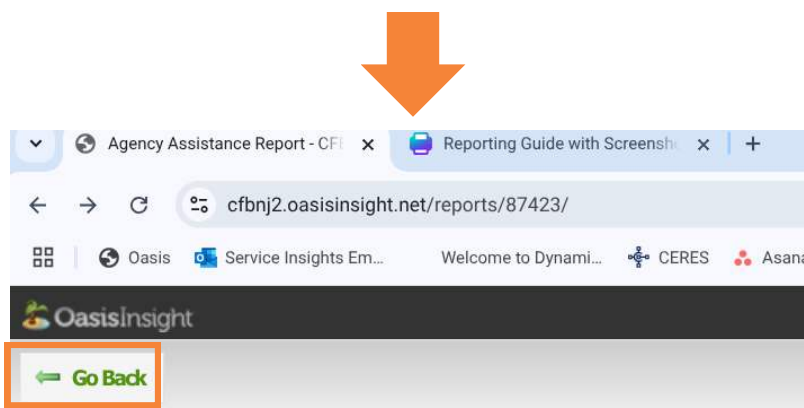*When selecting TEFAP or SPPP, a new section for Commodities will pop-up with 45 lines to input inventory. We'll look at this in more depth shortly.*

STEP 16

Start and End Dates
Add the dates of the month that you're reporting on using **MM-DD-YYYY** format.

After you add your dates, a title will automatically be created and added to the Title section further down on the page.

STEP 17

Commodities

After selecting a program, the page will expand in length, adding a Commodities section that allows you to track inventory for up to 45 commodities on one summary sheet.

Commodity Name
Add the type of commodity that your agency received through the program you've selected.

Commodity Inventory
For each good/item you list, you will need to manually add the number of cases (or quantities):
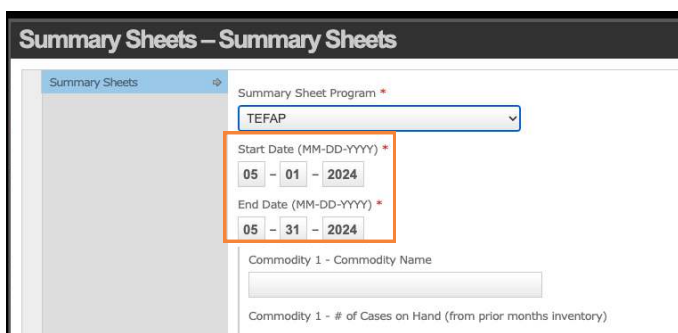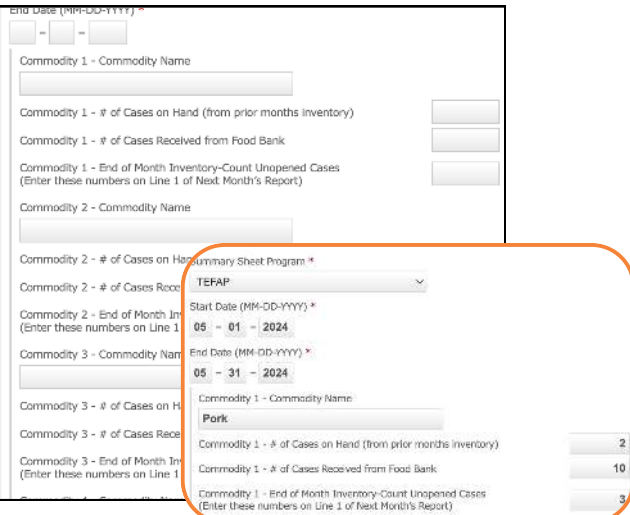
- Carried over from the **previous month's** inventory
- Received from the Food Bank for the **current month**
- Remaining at the **end of of the current month**

If your agency receives more than 45 types of goods through TEFAP, repeat this same process to create another summary sheet.

STEP 18

After adding all of the commodities, scroll down to the bottom of the form.

Signature of Agency Representative
Type your name in the field to add a digital signature.

Title of Summary Report
A title will automatically be generated based on the dates you enter.

Once you're finished adding each commodity, click **Save & Close**

STEP 19

After clicking save & close, you will be redirected to the reports tab, where the most recent summary sheet will be listed. Click **PRINT TEFAP/SFPP/DIABETES (PDF)** to open the PDF of the completed form.

STEP 20

The PDF of the completed Summary Sheet will open. To download the PDF, click on ⬇ at the top right of the screen.

STEP 21

The file explorer will open. The Chromebook will remember the last folder where you saved a downloaded document. If you followed the previous steps, you should already be in the correct folder. To verify if you are in the correct folder, review the folder names at the top of the file explorer.
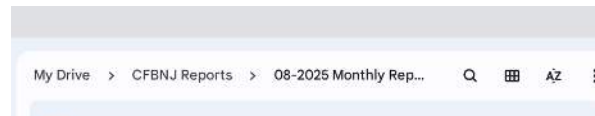
Once verified, change the default name of the file to **Month + Year + TEFAP/SFPP Summary Sheet (i.e. 08-2025 TEFAP Summary Sheet).** After changing the name, press **Save** .

STEP 22

Repeat steps 14 through 21 in order to complete the Summary Sheet Program for the other government program. Be sure to select the correct Summary Sheet Program in the drop down menu

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PART 3: SENDING REPORTS TO CFBNJ USING GMAIL

After generating + downloading all of your monthly reports, an email needs to be sent to partnerreporting@cfbnj.org that contains all your reports. By using the CFBNJ provided Chromebook, you can take advantage of Gmail to quickly send all of your reports. This section will go over the process of attaching files to an email created through Gmail.

STEP 1

At the bottom of the screen, click on the **M** to open Gmail.

STEP 2

Gmail will open. Click on ✏ Compose to create an email.
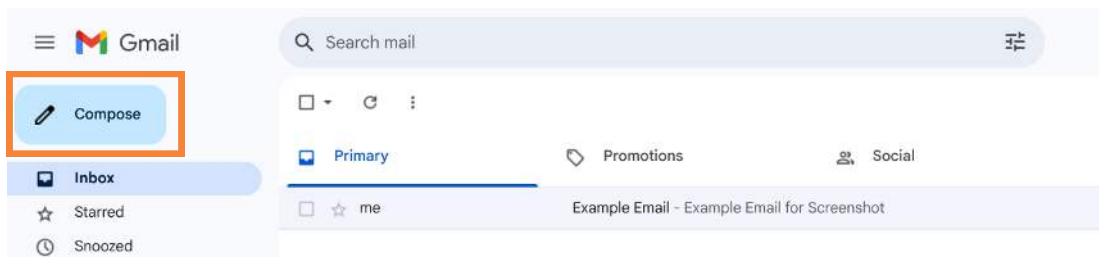
STEP 3

A "New Message" screen will appear to the right.
Fill out the email with the following information:

To: PartnerReporting@cfbnj.org

Subject: Agency Number + Month + Year + Monthly Reports (i.e. A1234-01 08-2025 Monthly Reports)

Body: A short message stating your agency name, name of primary contact, and their phone number

A1234-01 August 2025 Reports

partnerreporting@cfbnj.org

A1234-01 August 2025 Reports

Hello,

Attached are Stephen's Food Pantry's Reports for August 2025.

If you have any questions, please contact me at 201-123-4567

- Stephen

STEP 4

To attach your reports to the email, click on 📎 .

STEP 5

The file explorer will open. Go to the corresponding month's folder by clicking 🔽 △ Google Drive , double click on 📁 CFBNJ Reports , and then by double clicking the month's folder (i.e 📁 08-2025 Monthly Reports). Once in the correct folder, click on the icon next to each of the reports. This will highlight the documents. After highlighting all 3 PDFs, click Open to attach the files to the email.
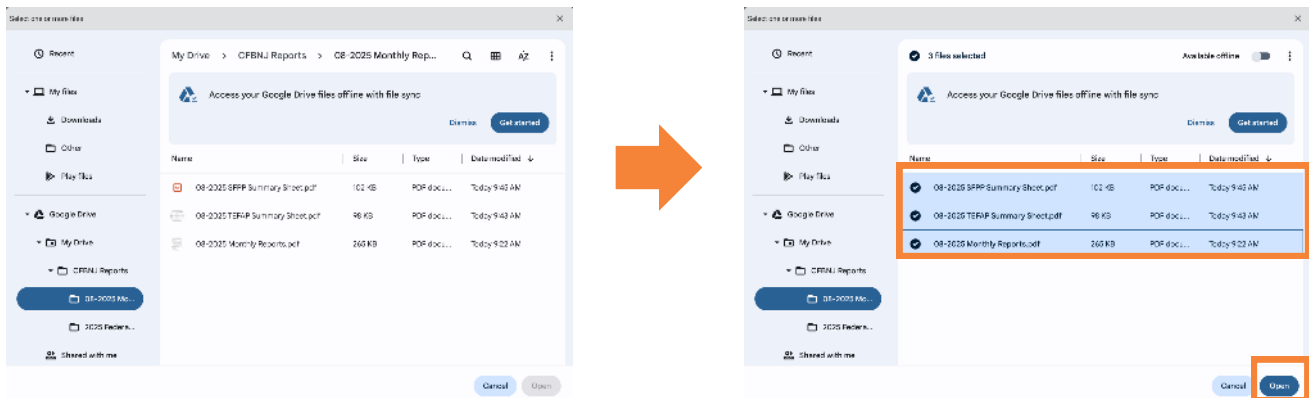
STEP 6

After attaching all 3 PDFs to the email, press Send 🔽 and you will have officially submitted all of your reports!

A1234-01 August 2025 Reports

partnerreporting@cfbnj.org

A1234-01 August 2025 Reports

Hello,

Attached are Stephen's Food Pantry's Reports for August 2025.

If you have any questions, please contact me at 201-123-4567

- Stephen

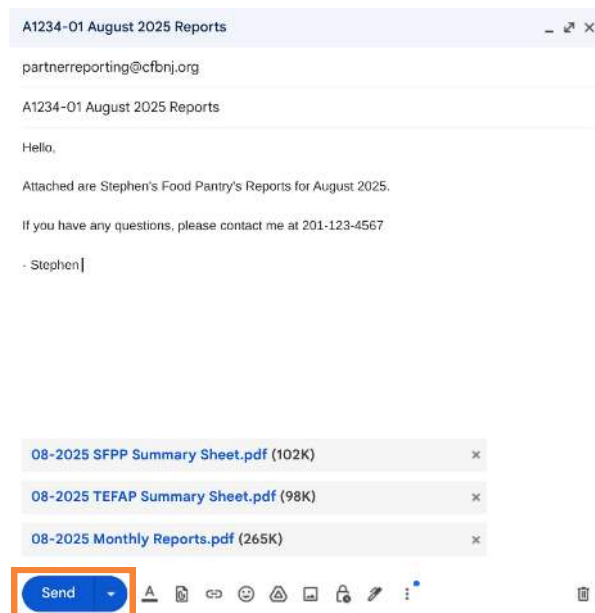08-2025 SFPP Summary Sheet.pdf (102K)
08-2025 TEFAP Summary Sheet.pdf (98K)
08-2025 Monthly Reports.pdf (265K)

PART 4: FEDERAL INTAKE FORMS

In addition to the 6 monthly reports required by CFBNJ, the NJDA also requires partners to maintain up-to-date documented records of every federal intake form completed by a neighbor at your organization each month. This record must readily available for reference by the state in the event of an inspection for 3 years, but does not have to be printed. In Oasis, the ROI is the digital version of the standard federal intake form, and in this last section, we will walk-through how to consolidate your federal intake forms for the month into a digital file.

🥕 *Partners are not required to submit the Federal Intake Report to CFBNJ unless otherwise requested.*
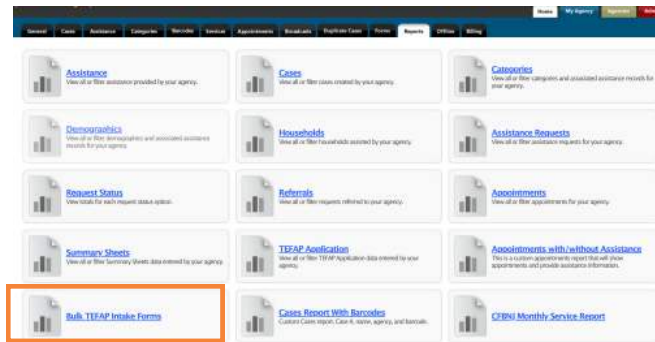
STEP 1

Return to the blue My Agency **tab, and then click the black** Reports **tab.**
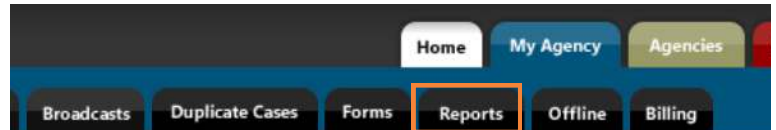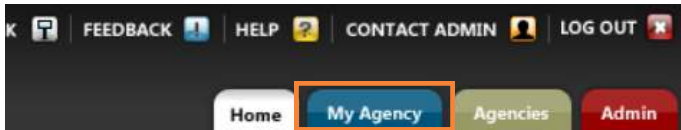
STEP 2

A list of various reports will appear. Scroll down until you see Bulk TEFAP Intake Forms **and then click.**

STEP 3

Click "Filter By Case Entry Date". Then enter dates in MM-DD-YYYY format.

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 **Case Entry Date** (Skip To Include All)

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

08 - 01 - 2025   to   08 - 31 - 2025

Click "Next" at the bottom of the window.

🔖 Filter By **Assistance Category** (Skip To Include All)

🔖 Filter By **Demographic Profile Match** (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

🥕 *The checked box next to Include Private Assistance should not be unchecked.*

STEP 4

To begin generating your report, locate ✅ **Request Report** and click it.

Choose Fields for Report

Order By
Entry Date - First to Last ▾

Custom Template
Bulk TEFAP Intake Forms ▾

← Back   ✅ Request Report   ✖ Cancel

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

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 5

To download the PDF, click on ⬇ the top right of the screen.

EMERGENCY FOOD REGISTRATION FORM
Intake Information
Clients must be residents of the State of New Jersey
Revision date 1-21-2025

Date: 08/18/25   LDA CFBNJ Test Environment, A1234-01   EFO The Community Food Bank of NJ

Name (Print): Marge Simpson   Birthdate: 01/01/70

Town & zip code (required): Oradell 07649

Phone #:   E-mail:

Number of adults in household: 4   Number of children under 18 in household: 2

QUALIFYING REASON (PLEASE CIRCLE)
A participant in one or more local state or federal programs at or below the income threshold established by the state agency for TEFAP eligibility will automatically qualify for TEFAP USDA Foods.

1. SELF DECLARATION - LOW INCOME (185% of poverty)
2. Existing Local, State or Federal Program participant (example – WIC)
3. DISASTER (Other – can be divorce, domestic violence, unusual expense, loss of employment, etc.)
   Please explain:

STEP 6

The file explorer will open. Go to the corresponding year's intake form folder by clicking ▾ 🔺 Google Drive , double clicking on 📁 CFBNJ Reports and then by double clicking the year's folder (i.e 📁 2025 Federal Intake Forms). Change to default file name to **Month + Year + Federal Intake Forms (i.e. 08-2025 Federal Intake Forms).** Press Save once finished.