

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.

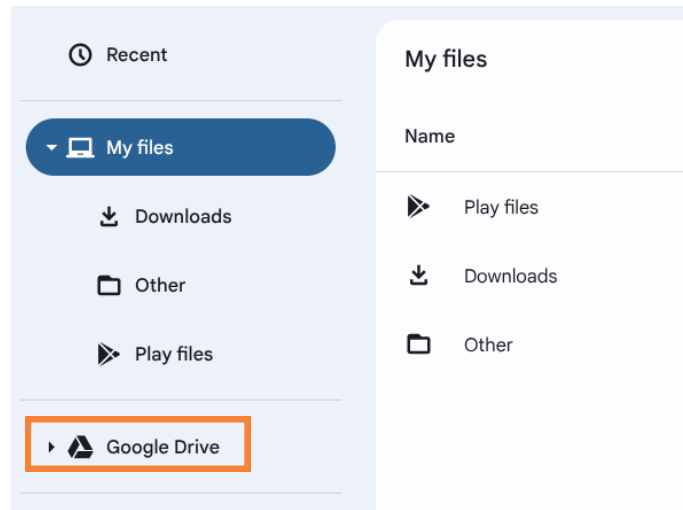
STEP 1

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

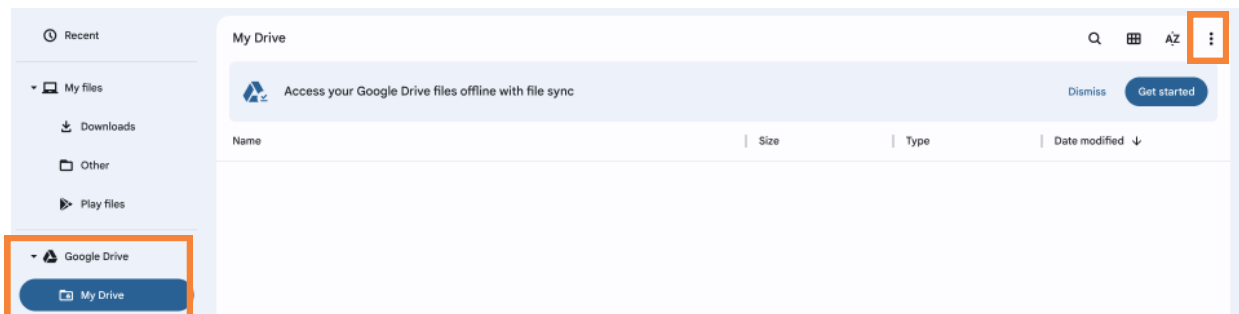


STEP 2

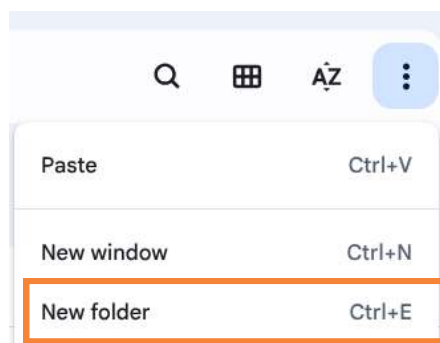
The file explorer will open. Click on  Google Drive

**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.

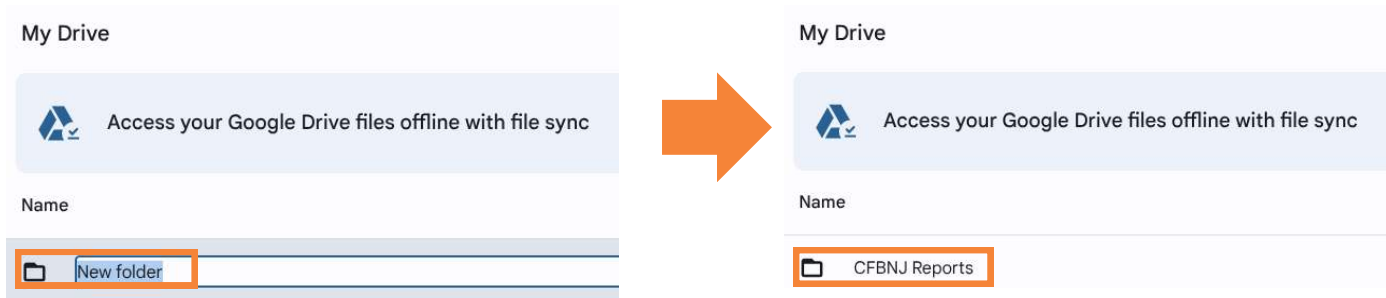
**STEP 4**

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  is. Press “Enter” on your keyboard to save the name of the folder.

**STEP 6**

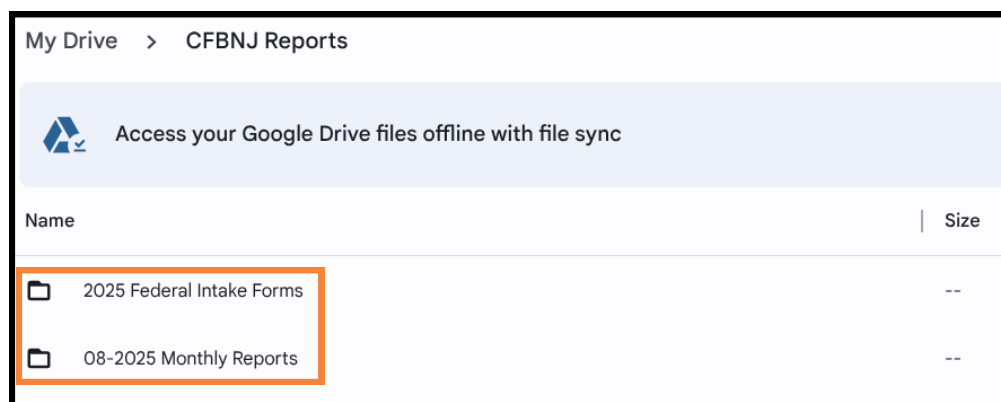
Open the new folder by double clicking on  CFBNJ Reports . Once opened, verify that the correct folder has been open. At the top of the screen, you should see My Drive > CFBNJ Reports

My Drive > CFBNJ Reports



Access your Google Drive files offline with file sync

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.

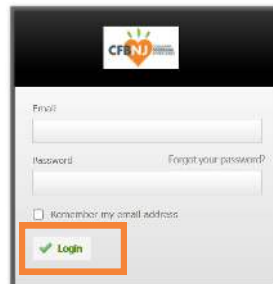
STEP 1

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



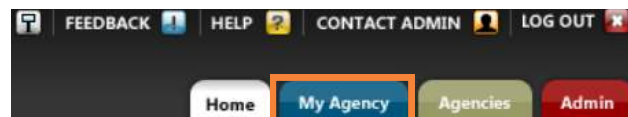
STEP 2

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



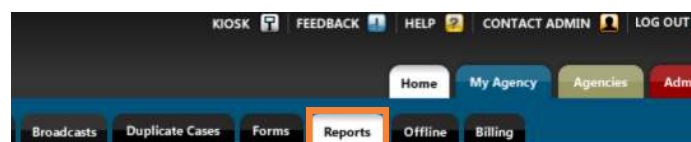
STEP 3

Click the blue  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  tab.

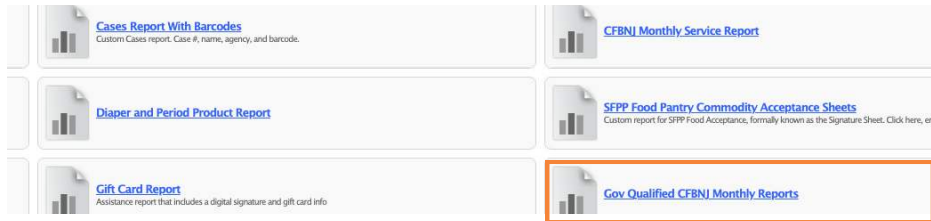


STEP 5

A list of various reports will appear. Scroll down until you see



and then click.



STEP 6

A window will pop up displaying filter options. Click



A field for dates will be revealed.

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

Click next at the bottom of the window.

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)

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 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



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
Gov Qualified CFBNJ Monthly Reports

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 8

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

Monthly Service Report

The Monthly Service Report is intended to capture TOTAL monthly households/individuals or meals served, inclusive of all product types received from CFBNJ, (i.e. TEFAP, SFPP), and warehouse. Your cooperation in submitting reports on time is a requirement of your membership with the FoodBank.

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 report emailed to Network Relations at PartnerReporting@cfbnj.org.

Month/Year: May 2024

Agency ID Number (i.e. A0001-01): A9999-09

Agency Name: CFBNJ Development and Test Agency A9999 Email: chbrown@cfbnj.org

Contact Name: Shayenne Brown Phone: _____

A. **Pantry Programs & Other Non-Meal Distributions**

CFBNJ Signature Sheet	SFPP Signature Sheet	TEFAP Signature Sheet
Number of Adults (over 18) served during the month: <u>54</u>	<u>51</u>	<u>51</u>
Number of Children (under 18) served during the month: <u>29</u>	<u>27</u>	<u>27</u>
Total Number of persons served during the month: <u>83</u>	<u>78</u>	<u>78</u>
Total Number of Households served during the month: <u>18</u>	<u>17</u>	<u>17</u>

B. **On-Premise/Congregate Feeding Programs** Agency ID: A9999-09
(Soup Kitchens, Group Homes, Shelters, After school programs)

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

o Number of breakfasts: 0

o Number of lunches: 0

o Number of dinners: 0

o Number of snacks: 0

o Number of home delivered meals: 0

2. Total Number of meals provided: 0

SFPP – The New Jersey State Food Purchase Program Commodity Acceptance Report

This document is submitted, along with the SFPP Inventory Report, to the Food Bank by the 7th day of the month in which the report is prepared.

Agency Name: CFBNJ Development and Test Agency A9999

Month/Year: May 2024 EFO: The Community Food Bank of NJ

Date	Printed Name	# Adults	# Children	# Meals	Full Address
1 05/11/24	Penny Shaker	2	1	4	31 Evans Terminal, Hills
2 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell
3 05/11/24	Bar Man	2	1	2	NA, Oradell
4 05/11/24	Mary Test Smith	2	1	4	124 Test Ave, Passaic
5 05/11/24	Joe Smith 2	3	2	4	31 Evans Terminal, Hills
6 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell
7 05/11/24	Celine Times	5	2	4	10 Elizabeth Ave, Brick
8 05/11/24	Celine Times	5	2	4	10 Elizabeth Ave, Brick
9 05/11/24	Super Man	2	1	4	31 Evans Terminal, Hills
10 05/11/24	Super Man	2	1	4	31 Evans Terminal, Hills
11 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell
12 05/11/24	Bar Man	2	1	2	NA, Oradell
13 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell
14 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell
15 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell
16 05/11/24	Shayenne Brown	5	2	4	31 Evans Terminal, Hills
17 05/11/24	Penny Shaker	2	1	4	31 Evans Terminal, Hills
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Total Adults & Children: 51 27

* SFPP foods shall not be sold, exchanged, or otherwise disposed of without the approval of the NEDA.
Do not accept money for income.

CFBNJ Non-Gov Commodity Acceptance Form

Agency: CFBNJ Development and Test Agency A9999 No: A9999-09

Month: May Yr: 2024

DATE	PRINTED NAME	# Adults	# Children	# Meals	Full Address	File Code
1 05/11/24	Penny Shaker	2	1	4	31 Evans Terminal, Hills	07185
2 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell	07647
3 05/11/24	Bar Man	2	1	2	NA, Oradell	07647
4 05/11/24	Mary Test Smith	2	1	4	124 Test Ave, Passaic	08060
5 05/11/24	Joe Smith 2	3	2	4	31 Evans Terminal, Hills	07185
6 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell	07647
7 05/11/24	Celine Times	5	2	4	10 Elizabeth Ave, Brick	08724
8 05/11/24	Celine Times	5	2	4	10 Elizabeth Ave, Brick	08724
9 05/11/24	Super Man	2	1	4	31 Evans Terminal, Hills	07185
10 05/11/24	Super Man	2	1	4	31 Evans Terminal, Hills	07185
11 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell	07647
12 05/11/24	Bar Man	2	1	2	NA, Oradell	07647
13 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell	07647
14 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell	07647
15 05/11/24	Stephen Shaker	3	2	27	122 Apple St., Oradell	07647
16 05/11/24	Shayenne Brown	5	2	4	31 Evans Terminal, Hills	07185
17 05/11/24	Penny Shaker	2	1	4	31 Evans Terminal, Hills	07185
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STEP 9

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

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100%

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Monthly Service Report

The Monthly Service Report is intended to capture TOTAL monthly households/individuals or meals served, inclusive of all product types received from CFBNJ, (i.e. TEFAP, SFPP), and warehouse. Your cooperation in submitting reports on time is a requirement of your membership with the FoodBank.

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.

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

Save file as

Recent

My files

Downloads

Other

Play files

Google Drive

My files > Downloads

Name

Screenshot 2025-07-18 9:18:35



Screenshot 2025-07-18 9:17:49

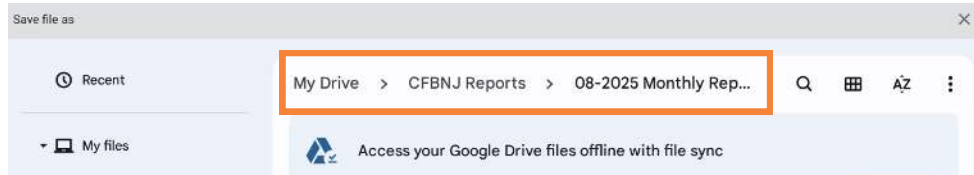
Screenshot 2025-07-18 9:17:19

Screenshot 2025-07-18 9:15:50

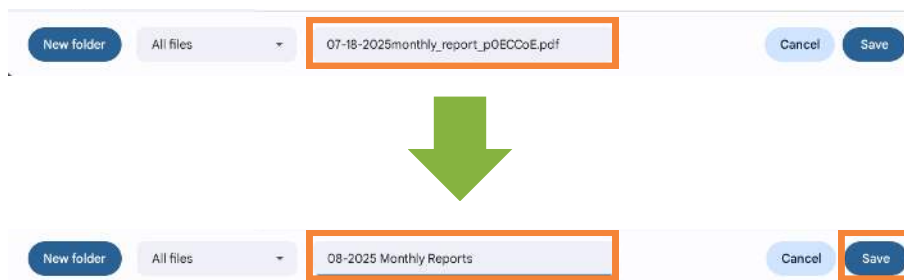
Screenshot 2025-07-18 9:15:17

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**

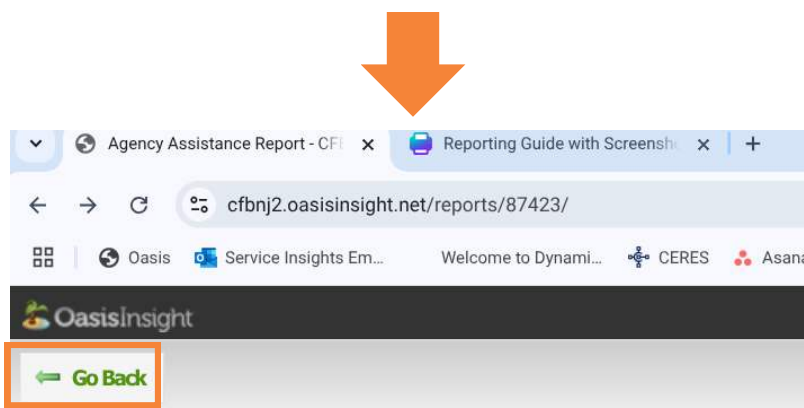
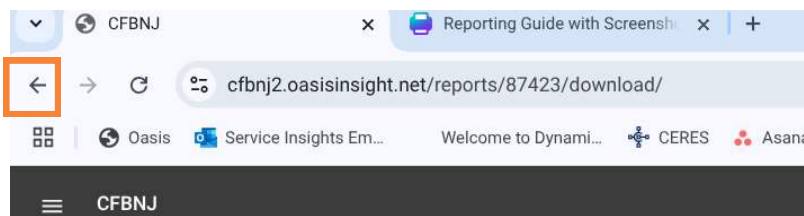
Click on the file to rename the file from the default name to the corresponding **Month + Year + Monthly Reports (i.e. 08-2025 Monthly Reports)**. Once renamed, press 



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  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

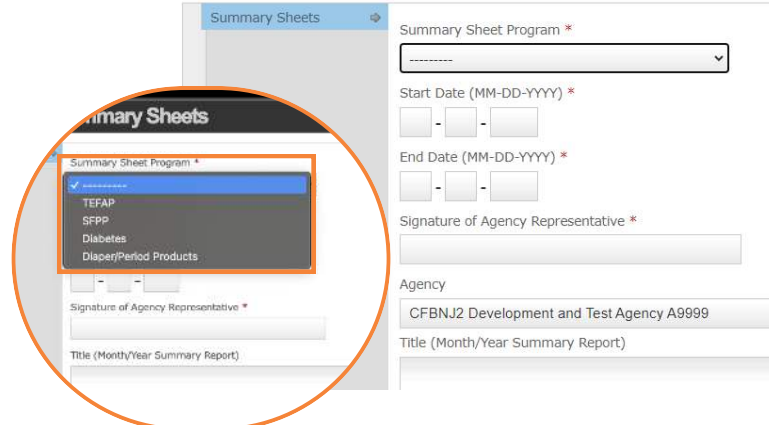
A new **Summary Sheets** window will open. Let's break down each of the required fields and what to expect.

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.

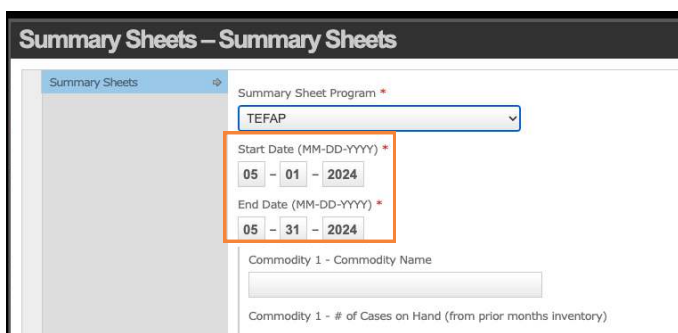


When selecting TEFAP or SFPP, a new section for Commodities will pop-up with 45 lines to input inventory. We'll look at this in more depth shortly.

Summary Sheets – Summary Sheets

STEP 16**Start and End Dates**

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

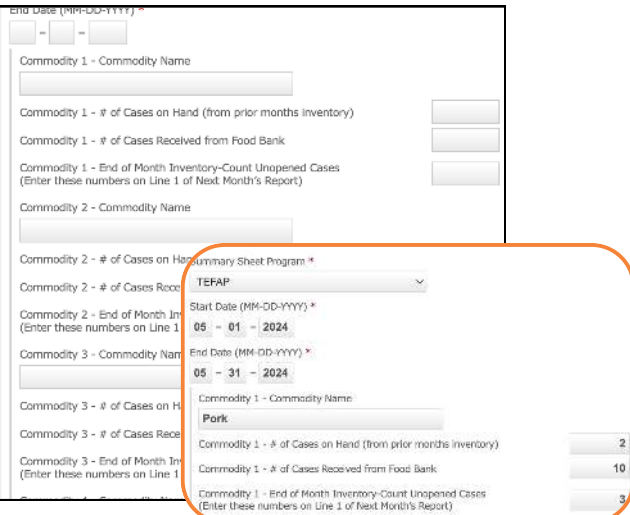
After you add your dates, a title will automatically be created and added to the Title section further down on the page.



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.



End Date (MM-DD-YYYY) *

Commodity 1 - Commodity Name

Commodity 1 - # of Cases on Hand (from prior months inventory)

Commodity 1 - # of Cases Received from Food Bank

Commodity 1 - End of Month Inventory-Count Unopened Cases (Enter these numbers on Line 1 of Next Month's Report)

Commodity 2 - Commodity Name

Commodity 2 - # of Cases on Hand Summary Sheet Program *

Commodity 2 - # of Cases Received

Commodity 2 - End of Month Inventory (Enter these numbers on Line 1 of Next Month's Report)

Commodity 3 - Commodity Name

Commodity 3 - # of Cases on Hand

Commodity 3 - # of Cases Received

Commodity 3 - End of Month Inventory (Enter these numbers on Line 1 of Next Month's Report)

Start Date (MM-DD-YYYY) *

05 - 01 - 2024

End Date (MM-DD-YYYY) *

05 - 31 - 2024

Commodity 1 - Commodity Name

Pork

Commodity 1 - # of Cases on Hand (from prior months inventory)

2

Commodity 1 - # of Cases Received from Food Bank

10

Commodity 1 - End of Month Inventory-Count Unopened Cases (Enter these numbers on Line 1 of Next Month's Report)

3

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




Signature of Agency Representative *

Stephen Shuler


Title (Month/Year Summary Report)


August 2025 TEFAP Summary Report

Edit Entry Date/Time — Jul 18, 2025 at 9:25 a.m.

Save & Close Cancel

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.



General Cases Assistance Categories Barcodes Services Appointments Broadcasts Duplicate Cases Forms Reports Offline

ADD FORM +

Stephen Shuler
CFBNJ Test Environment, A1234-91

Aug 18, 2025 at 9:25 a.m. | EDIT | DELETE

August 2025 TEFAP Summary Report

Summary Sheets
for CFBNJ Test Environment, A1234-91


SHOW AGENCY FORMS FIELDS

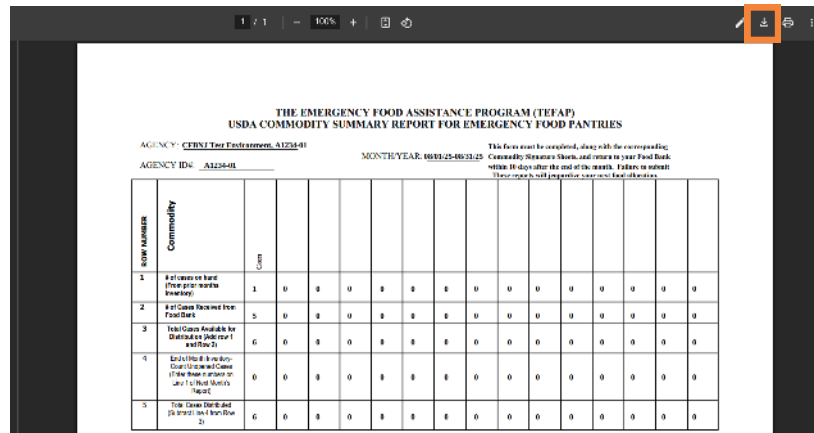
SHOW (8) MODIFICATIONS

PRINT TEFAP/SFPP/DIABETES (PDF)

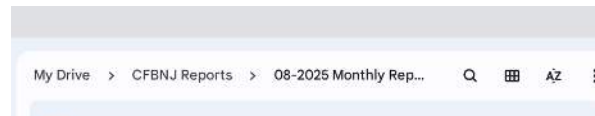
EDIT AGENCY FORMS COPY AGENCY FORMS


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 .

**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

Summary Sheet Program *

SFPP

Start Date (MM-DD-YYYY) *

8 - 1 - 2025

End Date (MM-DD-YYYY) *

8 - 31 - 2025

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.

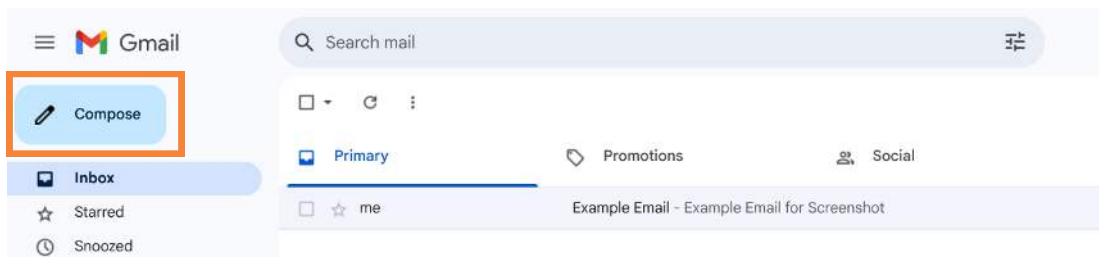
STEP 1

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



STEP 2

Gmail will open. Click on  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

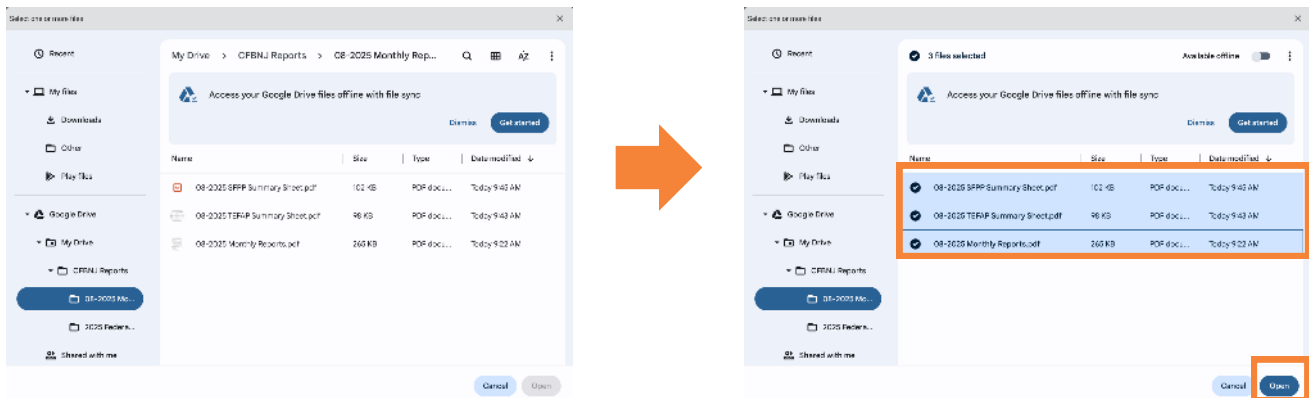
- Stephen


STEP 4

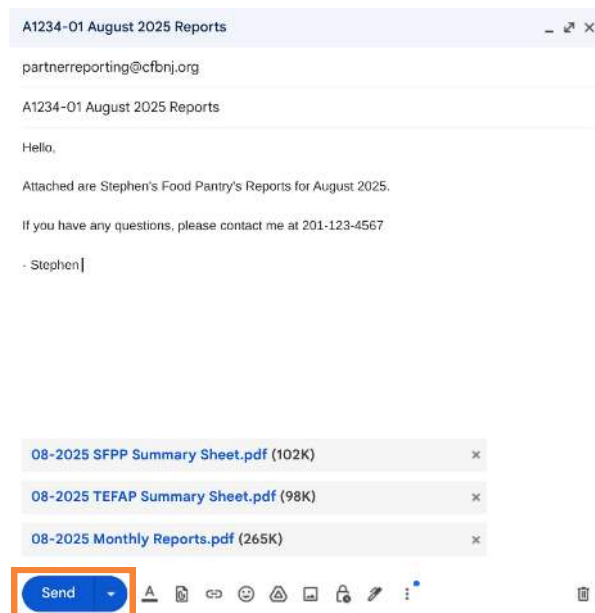
To attach your reports to the email, click on .

**STEP 5**

The file explorer will open. Go to the corresponding month's folder by clicking , double click on , and then by double clicking the month's folder (i.e. ). 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  to attach the files to the email.

**STEP 6**

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



PART 4: FEDERAL INTAKE FORMS

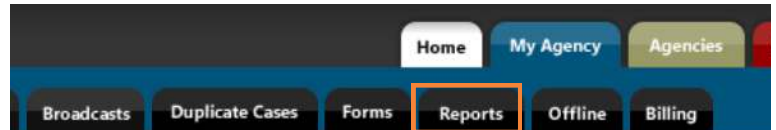
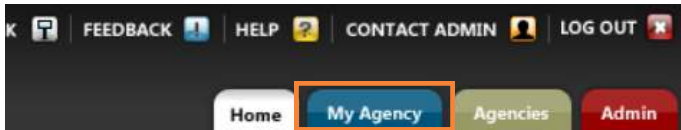
In addition to the 6 monthly reports required by CFBNJ, the NJDA also requires partners to maintain up-to-date documented records of every federal intake form completed by a neighbor at your organization each month. This record must readily available for reference by the state in the event of an inspection 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.

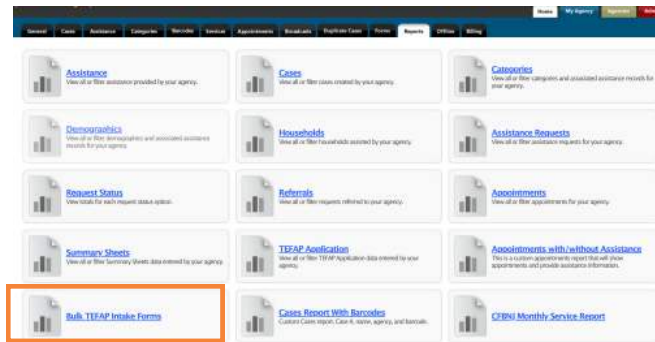
STEP 1

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

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)



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

STEP 4

To begin generating your report, locate  and click it.

Choose Fields for Report

Order By
Entry Date - First to Last

Custom Template
Bulk TEFAP Intake Forms

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.

1 / 1 | 100% +

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  once finished.

