

OASIS INSIGHT ONBOARDING COMPANION

OASIS INSIGHT CHEAT SHEET

MY AGENCY LOGIN DETAILS

[HTTP://CFBNJ2.OASISINSIGHT.NET](http://cfbnj2.oasisinsight.net)

WIFI

Network:

Password:

Chromebook

G-Mail:

Password:

Oasis Insight

Email Address:

Password:

Agency ID: _____

Name of Trainer: _____

Agency Name: _____

CFBNJ Contact: serviceinsights@cfbnj.org

FOOD • HELP • HOPE

OASIS INSIGHT STEP BY STEP GUIDE

HOW TO INTAKE NEIGHBORS WITH OASIS INSIGHT

For All Community Partners

OVERVIEW

BY THE END OF THIS GUIDE, PARTNERS WILL BE ABLE TO:

Complete the intake process on Oasis following these 4 steps:

1. Adding / Locating a Case
2. Completing Release of Information (ROI)
3. Assigning Key Tag to a Case
4. Recording Food Assistance

Commonly Used Terms/Phrases

Neighbor	The community members who receive assistance.
Case	On Oasis, this is the location of a neighbor’s information.
Assistance Record	The food / products the neighbor receives.
Community Partner	Agencies that partner with CFBNJ.
R.O. I	Release of Information; A digital version of the standard federal intake form.

PART 1

Intake Refresher

How to remember the three steps to complete the intake process.

PART 2

New Neighbors

How to add a case, sign R.O.I. and create assistance records.

PART 3

Key Tag Pantry I.D

How to assign a key tag to a neighbor’s case.

PART 4

Return Neighbors

How to locate and complete intake for returning neighbors.

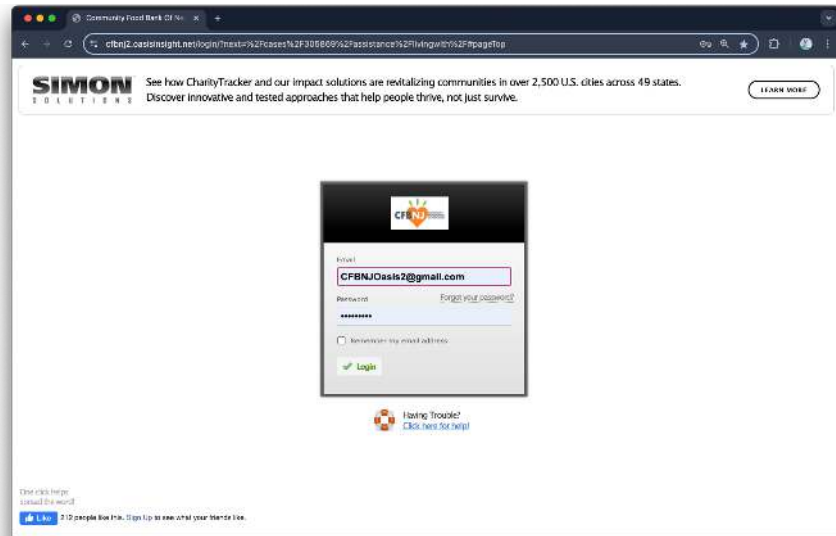
PART 2: NEW NEIGHBOR INTAKE PROCESS

CASES

STEP 1

Open your web browser and navigate to cfbnj2.oasisinsight.net.

Then, using your Oasis credentials, log into your account.

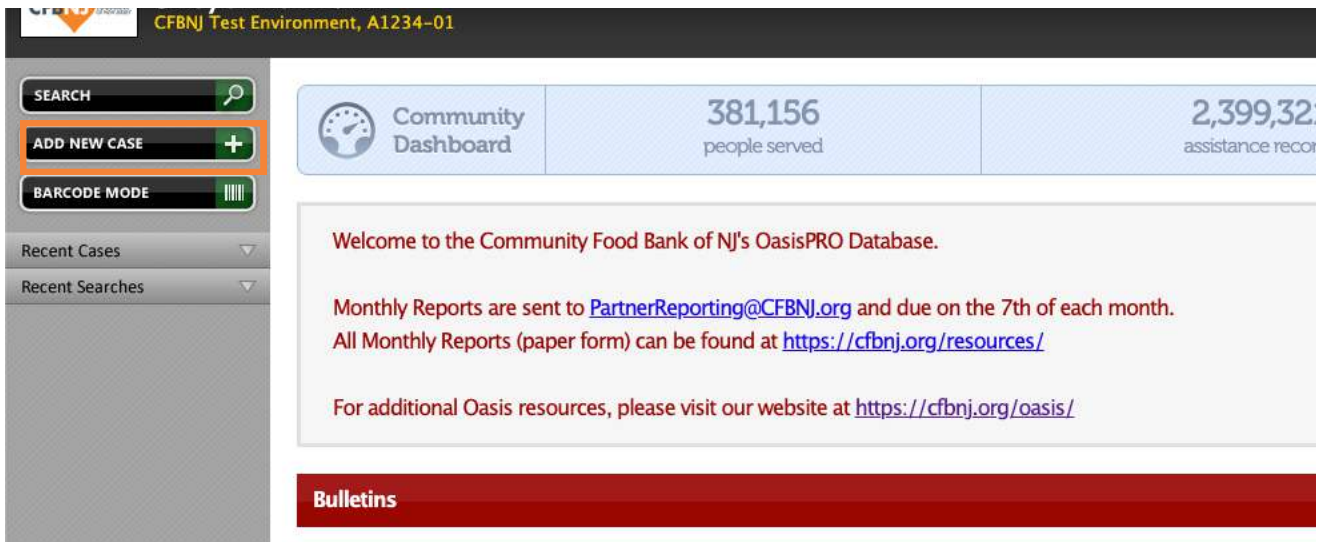


It is imperative that the web address is typed correctly, with the 2 included: cfbnj2.oasisinsight.net

STEP 2

When adding a neighbor to Oasis **for the first time**, Click **ADD NEW CASE**

The intake form will open upon clicking.



STEP 3

Complete all of the **required** fields outlined below.

Identification Demographics

First Name * Middle Name Last Name *

Maiden Name

Date Of Birth (MM-DD-YYYY)

Head Of Household

Enter the neighbor's first and last name

We recommend adding additional details such as birthdate.

Address Apartment

City * State * Zip *

County *

Enter the neighbor's City, State, Zip Code and County.

You can use your pantry's address if the neighbor cannot provide details.

Calculated Household Size: 0

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

Of Those Children, How Many Of Them Are Younger Than 4 Years Old?

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

Of Those Adults, How Many Of Them Are Over The Age Of 60? — **Required**

Next, use the dropdowns to select the number of household members for each **required field**.

Total Adults is inclusive of Adults Over The Age of 60

Qualifying Reason: 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

Select the neighbor's self-declared qualifying reason.

— **Required** (Select at least one)

1. SELF DECLARATION - LOW INCOME (185% Of Poverty)

2. Existing Local, State, Or Federal Program Participant (Example - SNAP/Food Stamps, WIC, Medicaid)

3. DISASTER (Other - Can Be Divorce, Domestic Violence, Unusual Expense, Loss Of Employment, Etc.)

Scroll to the bottom and click "Add Case."

If all of the required fields have been successfully added, You will then be redirected to the neighbor's case.

RELEASE OF INFORMATION

The ROI is a digital representation of the federal intake form. All neighbors are required to sign the ROI once per year.

STEP 1

Once the case has been created and opened, complete the Release of Information.

Click **Create New ROI** located in the yellow banner at the top of the case.

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 Ryan Simpson

Address: 354 Forest St Jersey City, NJ 07304
 Mailing Address: Not Provided
 County: Hudson
 Maiden: Not Provided
 DOB: Not Provided
 Case #: C387650
 Phone: Not Provided
 Total Living in Household: 4
 Agency Last Assistance: Jun. 15, 2025
 Network Last Assistance: Jun. 15, 2025

Details: How many Children (ages 17 and under) are in your Household?: 2
 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?: 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 7 - Disaster or Special Circumstance (e.g. divorce, domestic violence, loss of employment, etc.)

Click **Next** on the **New Release of Information** window.

New Release of Information

Date: 6 - 9 - 2024

Cases To Include

Lemony Snicketts (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**

A yellow banner will always appear at the top of every new case, indicating the ROI needs to be signed.

STEP 2

Scroll to the bottom of the ROI and click the yellow signature line.

CFBNJ COMMUNITY FOODBANK OF NEW JERSEY

Oasis Assistance Network Client Consent Form

CFBNJ2 Development and Test Agency A9999

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 Pantry. 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 Pantry, 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 Pantry.

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) 726-2600 (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) 832-9892, 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) 690-7442; 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 **X** **Click Here for Digital Signature**

After the neighbor has finished digitally signing,

Click **Submit Signature**

Sign Your Name Below

Lemony Snicketts

Submit Signature

Scroll back up to the top of the ROI and click **Verify ROI**

Confirmation

I, Sheyenne Brown, verify that a release of information for Lemony Snicketts has been signed and will be kept on file for a minimum of 365 days from today.

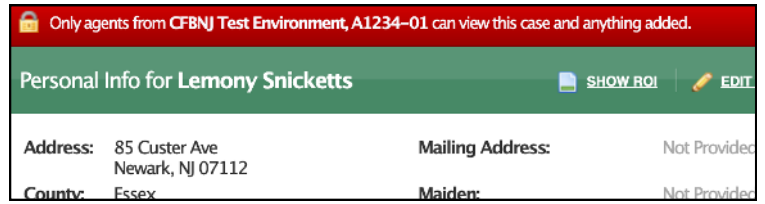
OK **Cancel**

Click **"OK"** to verify and save the ROI. You will be directed back to the neighbor's case.

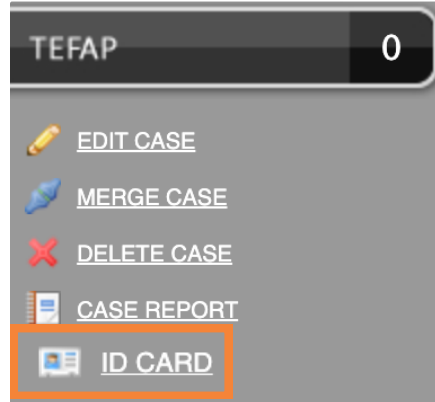
PART 3: KEY TAG PANTRY I.D. SETUP

STEP 1

After verifying, you'll be redirected to the case. If only **Red** and **Green** banners are showing, the neighbor ROI is uploaded.



Next, we need to assign a neighbor a key tag.



Scroll down to the bottom of the right side case menu. Click:

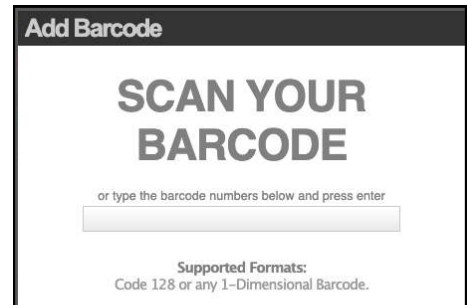
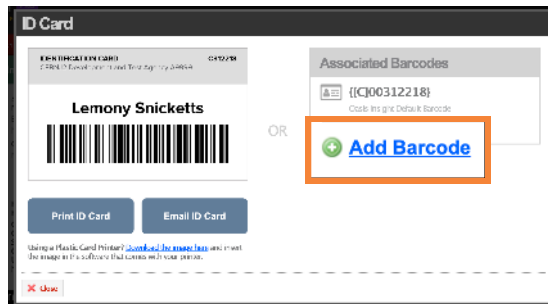
STEP 2

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

Scan the back of the key tag.



You will need your barcode scanner and key tag.



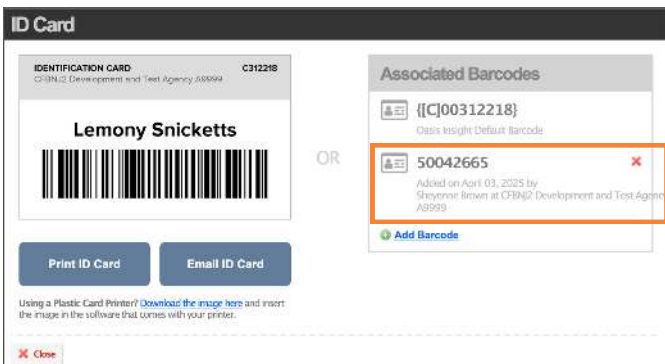
Scan the key tag again to verify once prompted.

STEP 3

The key tag number will now appear as an associated barcode on the neighbor's case.

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

Then, click **Close**



Before giving the key tag to your neighbor, scan it to make sure it opens up their case.

ASSISTANCE RECORDS

STEP 1

You can easily track assistance during distribution days by using the CFBNJ issued Chromebook(s), Barcode Scanner(s) and barcode sheet(s).

What you will need:



With the case opened, use the scanner and barcode sheet and scan the applicable assistance category.



TEFAP + NON-GOVERNMENT FOOD
Gov Qualified

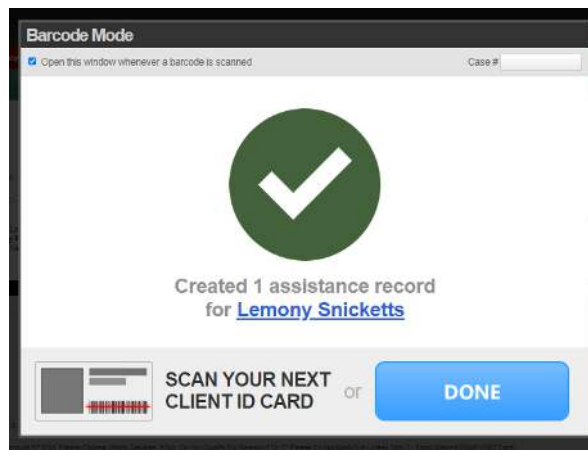
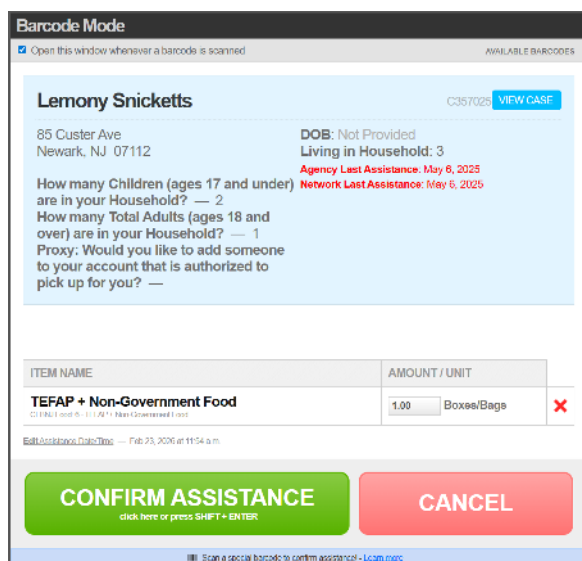


NON-GOVERNMENT FOOD DISTRIBUTION
Non-Gov Qualified

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

STEP 2

A window summarizing the assistance your neighbor is receiving will open. Once you have finished scanning the relevant category barcodes, confirm that the details are correct by clicking **CONFIRM ASSISTANCE**



The assistance record has now been recorded. Click **DONE** to confirm the record has been added.

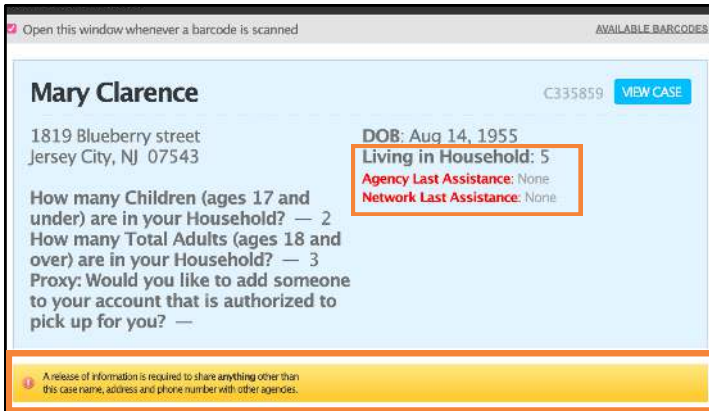
If your agency would like to receive Chromebooks and barcode scanners to use with Oasis, please send an email to serviceinsights@cfnj.org.

PART 4: RETURNING NEIGHBOR INTAKE PROCESS

After a neighbor has been added into Oasis, you can easily access their case by scanning their key tag.

STEP 1

If previously issued, scan the neighbor's key tag to access their case.



A summary window of the neighbor's case will open, displaying:

- The number of individuals living in the household
- Lat date they received assistance from your agency
- The status of their R.O.I (if expired).

If the yellow "R.O.I expired" banner is displayed, it will need to be renewed.

Click **VIEW CASE** to be redirected to the case, then repeat the R.O.I completion steps outlined on page 5 of this guide.

If a neighbor has misplaced their key tag, refer to page 8 of this guide on searching for cases.

STEP 2

Add the assistance record by using the barcode scanner to scan the applicable assistance category barcode(s).

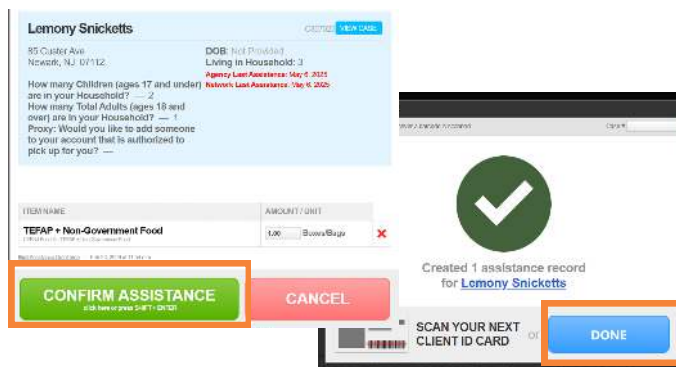


STEP 3

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

Double check that the correct assistance category was scanned before confirming.

Then, click:



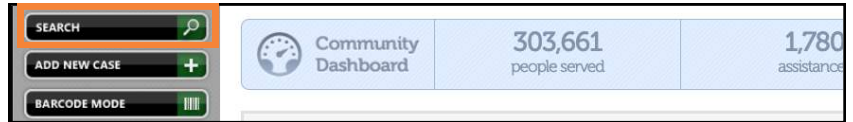
A "Created Assistance Record" window will open.

Click **DONE** to ensure the record has been saved.

USEFUL INFORMATION & DISCLAIMERS

NEIGHBORS WITHOUT THEIR KEY TAGS

Click the **Search** button at the top of the left side menu.

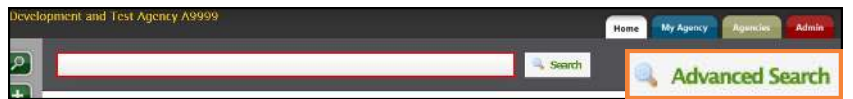


Enter the neighbor's name, then click **Search**.



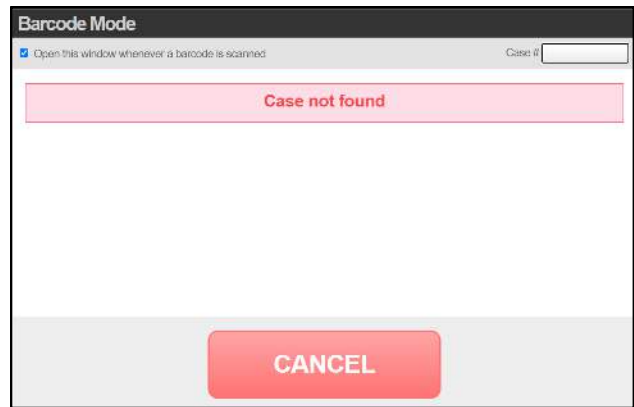
Click the name to be redirected to their case.

If the neighbor's case **does** exist but is not appearing, click **Advanced Search**



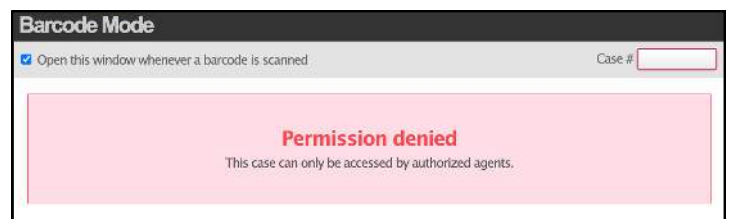
CASE NOT FOUND

If you scan a neighbor's key tag, and receive a **"case not found"** alert, click cancel. Then, try to scan the key tag again.



"PERMISSION DENIED" ERROR MESSAGE

If a key tag from another agency is scanned, the neighbor's basic information (name, address, DOB), will appear. When you attempt to either view their case or add an assistance record, Oasis will prevent you from doing so.



USEFUL INFORMATION & DISCLAIMERS

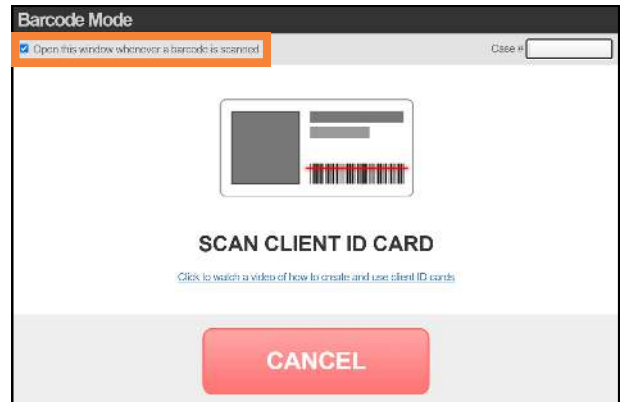
USING BARCODE MODE

If you prefer to be directed to the neighbor’s full case instead of the pop-out barcode screen:

Click



Then, deselect the checkmark next to “Open this window whenever a barcode is scanned”.



NEIGHBORS WITH MULTIPLE KEY TAGS

Due to privacy settings in Oasis, if a neighbor visits multiple pantries that are using CFBNJ's key tags, they will need to have a unique barcode/key tag for each agency.

We recommend keeping a Sharpie on hand and writing the initials of your organization within the white heart on the front of the key tag to help the neighbor identify which key tag is for which organization.



OASIS INSIGHT AUTO-GENERATED BARCODES

In the event that there are no more key tags to distribute and/or neighbors have done remote intake with kiosk mode, the existing barcode that Oasis created can be used in the place of the key tags.

