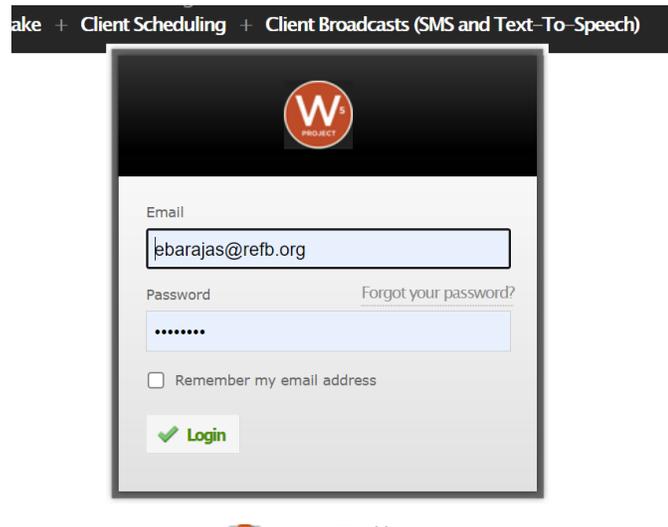


Work Instructions for: Charity Tracker Pro + Oasis Insight Pro (W5)

1. Open up Google Chrome on your tablet/computer and access Oasis W5. You can save it as a tab or have it automatically open up when you open up Google Chrome. If you have issues and the page is not loading, please go to oasisinsight.net and type in your login credentials.
2. Log into W5 using the email account and password associated with that account.



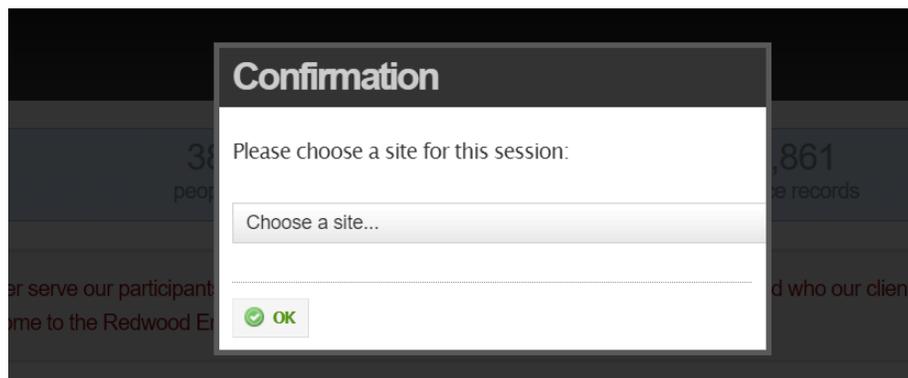
W5 PROJECT

Email
ebarajas@refb.org

Password
.....
[Forgot your password?](#)

Remember my email address

3. Select a site from the drop down menu. It is **very important** to select the correct site or partner name as the assistance you will be providing in the system will go to that specific site. If you choose the incorrect site all the assistance provided will go towards that site and your reports won't be accurate. **Partners will select their own names.**

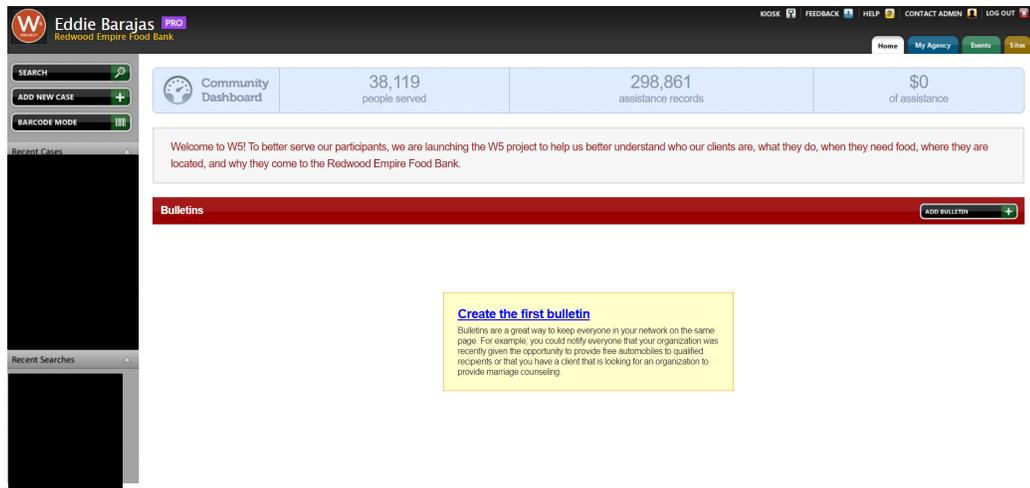


Confirmation

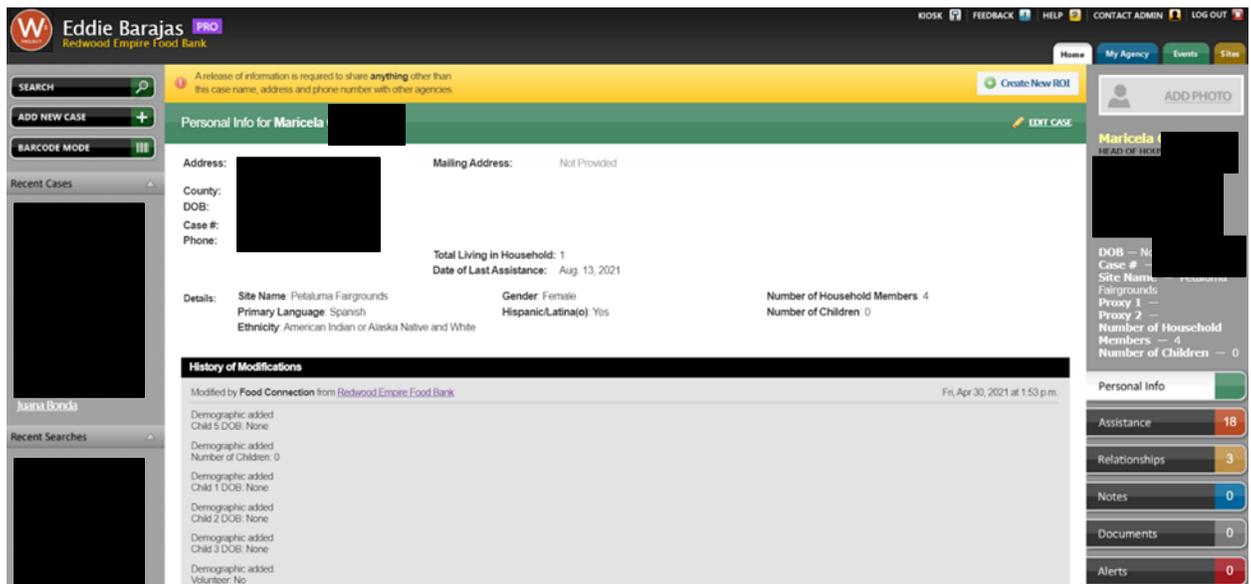
Please choose a site for this session:

Choose a site...

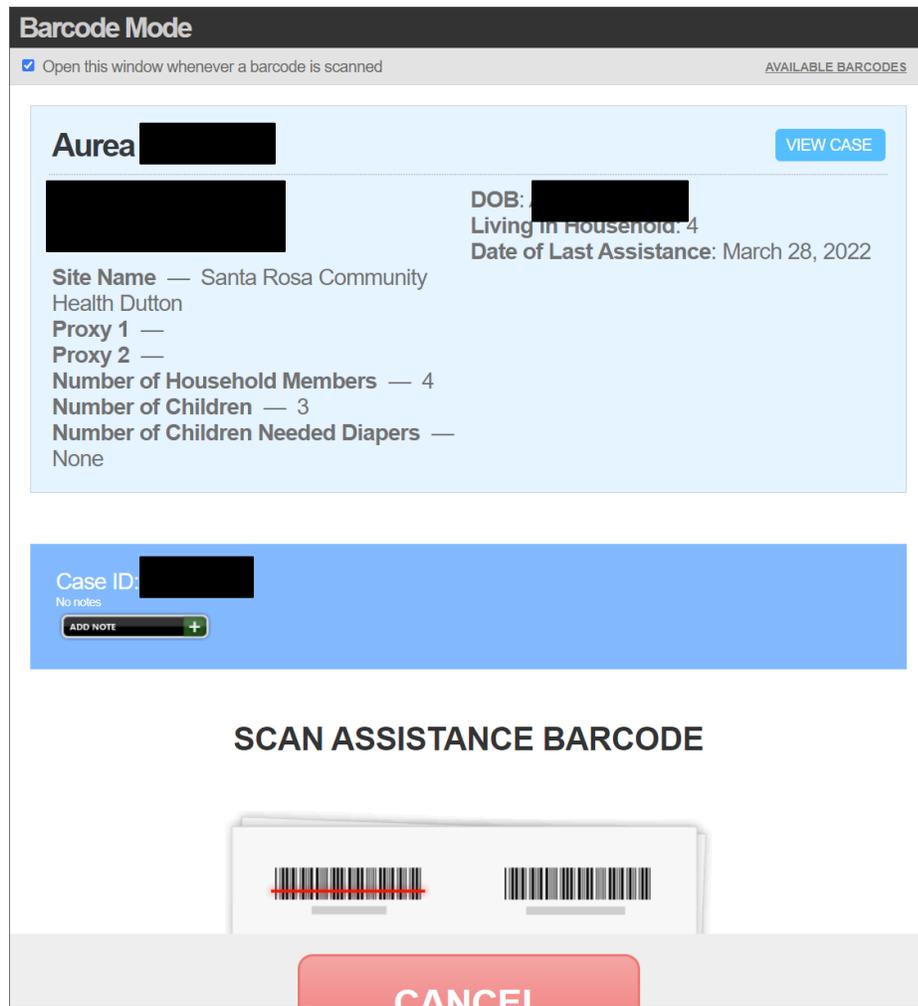
4. Oasis Overview (Main Screen)



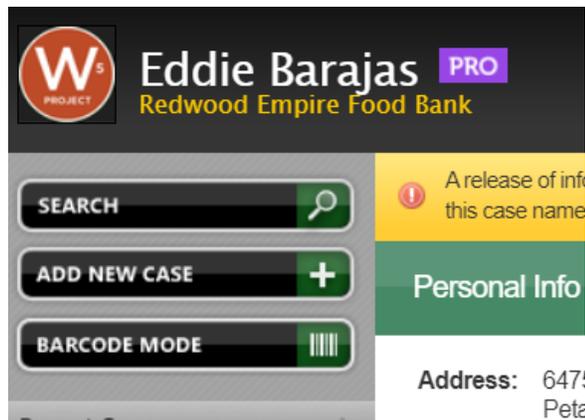
5. From this point on, you can start scanning someone for assistance, search someone in Oasis or add a new case.
6. If someone is already registered with us and has a profile created in Oasis (W5), when you scan a card, the following screen will be displayed:



7. If you previously selected “Open this window whenever a barcode is scanned” the following will be displayed. If you do not want to have this screen open up, then you can uncheck the box and you will get the screen below step 6 instead.



8. From the screen above, you can search, add new case or view barcodes.



9. If you click on search, the following screen will appear:

The screenshot shows the 'Advanced Search' page. On the left sidebar, there are buttons for 'SEARCH', 'ADD NEW CASE', and 'BARCODE MODE'. Below these are sections for 'Recent Cases' and 'Recent Searches'. The main area contains search fields for 'First name', 'Last name', 'Case ID', 'Date of birth (MM-DD-YYYY)', 'Address', 'City', 'State', 'Zip', 'Phone', and 'Other ID'. A 'Search' button is located below the fields. At the bottom right, there is a checkbox labeled 'Only show HEAD OF HOUSEHOLD in search results.'.

From here, you can search by any of the fields that are listed. Usually, the easiest way to search for someone is with their phone number as this tends to be unique. Second good option would be to search by DOB, and lastly would be by first and last name.

10. Once you type anything into the search field and there is a potential match, the following will be displayed:

This screenshot shows the search results for a query. The name 'Marta' is highlighted in blue. Below the name, there are fields for 'DOB', 'Phone #', and 'Email: No Email Provided'. A red arrow points to the 'Marta' name. At the bottom, there is a blue banner with the text: 'Don't see the case you're looking for? [Click here to create a case](#) from your search terms.'

From here, you would select the name of the participant at the bottom of the screen highlighted in blue. Once you select the name of the participant, you will be brought over to the picture below step 6 from which you can start issuing assistance.

11. If you click on add new case, the following screen will appear:

Add Case [Release of Information Form](#)

Identification **Demographics**

First Name * Middle Name Last Name * Suffix

Date Of Birth (MM-DD-YYYY) *

Head Of Household

Street Address **Mailing Address**

Address * Apt # Address Apt #

City * State Zip * City State Zip

Country * [COPY FROM STREET ADDRESS](#)

Phone Numbers *

Description Number Ext.

[Add Phone Number](#)

Number Of Household Members — Required

Number Of Children — Required

Diaper Client (Select Yes If Provided Proof Of DOB)

Child 1 DOB

Child 2 DOB

Child 3 DOB

Child 4 DOB

Child 5 DOB

Email Address

[Add Case](#) [Cancel](#)

To add a new case, fill out all of the required fields shown with a red asterisk. Please note there are two pages to fill out when creating a new case. First page is the identification page. On page 1 you can also add the number of children in the household. If your agency is offering diapers, you can type in how many children are eligible for diapers as well as their date of birth. At the REFB, we require proof of the child's date of birth. This can include a birth certificate, medical card or you can also verify this if the parent has the child with them at the time of registration. The second page is for demographic information and to add a proxy for someone else to be able to pick up food for the participant. You can have up to two proxies per client.

If you are intaking this client please ask them “In case you are unable to pick up your groceries do you give someone else permission to do so?”, if “yes” have them provide the name of the person or people that have permission to pick. In order to enter a proxy, the client needs to provide the first and last name of the person they are designating as a proxy. A proxy form can also be filled out by the participant and turned in by the person picking up food for them. You must enter the First and Last name of the proxy. Once you have filled out page one, you can click on the top left hand corner and select demographics, or select the next arrow on the bottom right hand corner.

The screenshot shows a web form titled "Add Case" with a "Release of Information Form" link in the top right. The form has two tabs: "Identification" and "Demographics", with "Demographics" currently selected. The form contains several required fields:

- Site Name:** A dropdown menu with a downward arrow.
- Gender — Required:** Three radio button options: Female, Male, and Other.
- Primary Language — Required:** A dropdown menu with a downward arrow.
- Hispanic/Latina(O) — Required:** Three radio button options: Yes, No, and Unknown.
- Ethnicity — Required:** A dropdown menu with a downward arrow.
- Proxy 1 (First Name & Last Name):** A text input field.
- Proxy 2 (First Name & Last Name):** A text input field.

At the bottom of the form, there are two buttons: a green "Add Case" button with a plus icon and a red "Cancel" button with an X icon. To the right of these buttons is a navigation arrow icon.

Once the second page has been completed, click on “Add Case”. You will then be brought back to the main page.

12. Once you are on the main page, the next step is to create an ROI (release of information). Click on Create New ROI on the top right hand corner.

On the following window, click next:

On the following page, click verify ROI on top right hand corner:

Dependent's Name	Relationship	Date of Birth

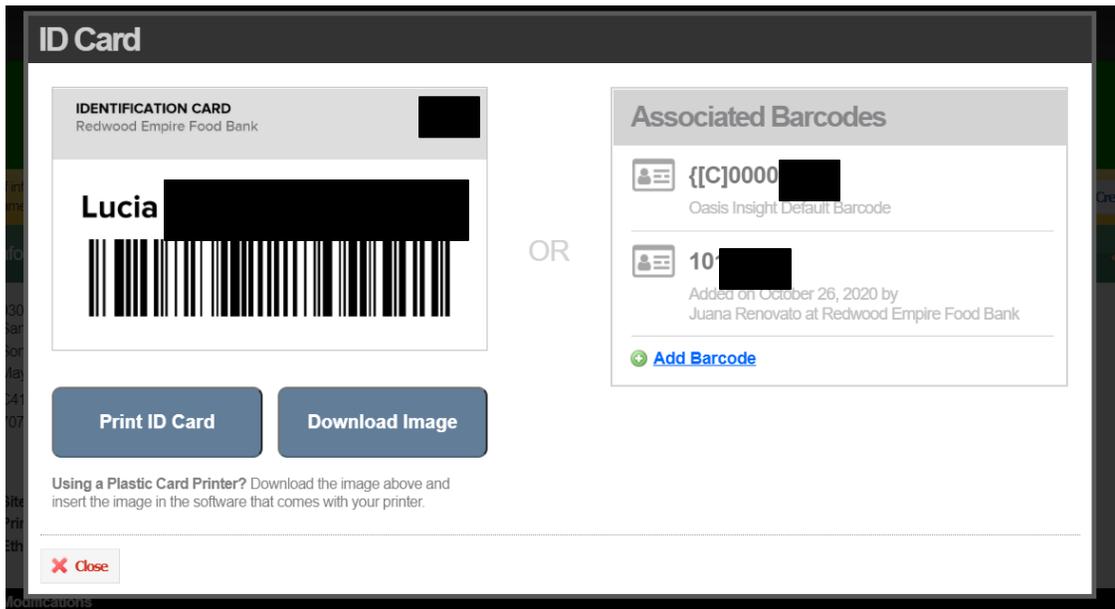
On the next screen, you will get a confirmation page, click "yes". The yellow banner on top of the sheet alerting you of creating an ROI, should now be gone.

13. Once a profile has been created, you will need to assign an ID card to the participant. Click on “ID Card” on the bottom right hand corner.

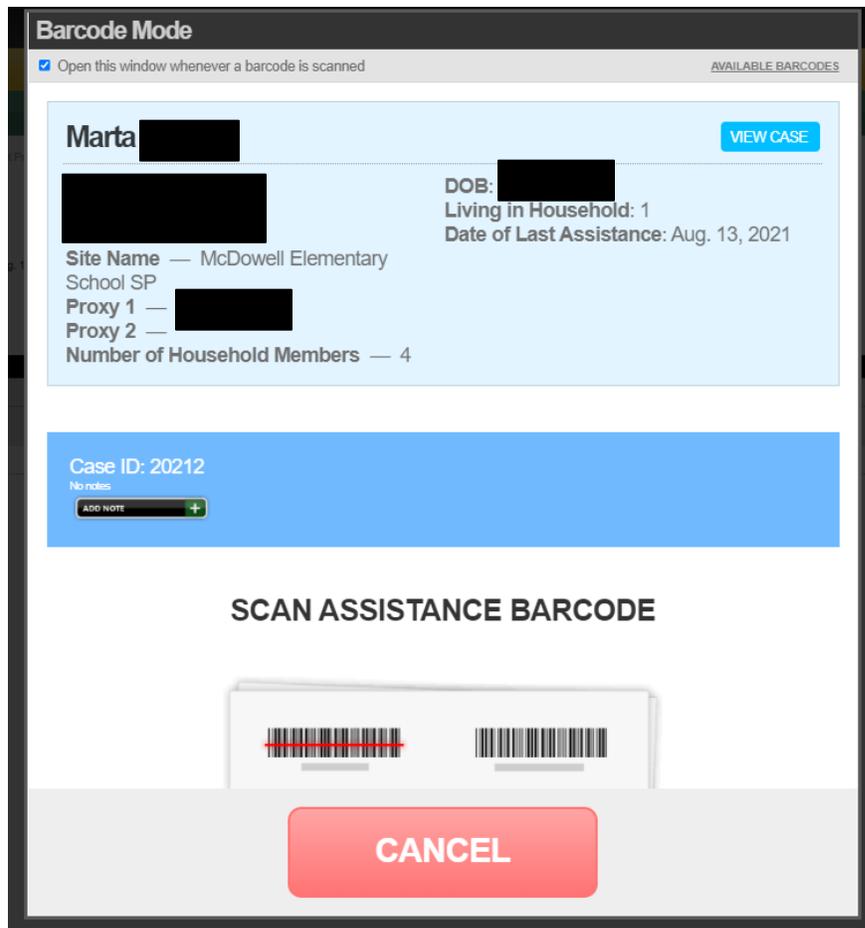


Click on “add barcode” and follow the instructions on the screen. It will ask you to scan the barcode twice. It is important to scan the barcode twice to confirm that the scan card has been activated. You can also add a barcode number manually by entering the number on the card you are giving to the client. You will need to follow the process of entering the number twice in order to verify as well. If you do not scan or enter the card twice, the card will not be activated and this will cause confusion when the participant tries to use the card at a distribution site. You can also tell if a scan card was activated if the number on the back of the card under the barcode shows up under “Associated barcodes”. 1 scan card is associated with 1 household. Click close on the bottom left hand corner to exit this page and it will bring you back to the profile main screen.





14. If a participant has a case with us, you would click on the barcode mode and add assistance. Once you click the barcode more, the following options will be displayed:



From this screen, select available barcodes on the top right corner. Once you select this option, the following screen will appear: (This portion will be different for Partners depending on your own programs.)

The screenshot displays a mobile application interface titled "Barcode Mode". At the top, there is a header bar with a checked checkbox and the text "Open this window whenever a barcode is scanned" on the left, and a "BACK" button on the right. Below the header is a list of ten barcode entries, each consisting of a barcode image, a program name in blue text, a quantity in a green box, and an assistance number in small grey text.

Barcode	Program Name	Quantity	Assistance
[Barcode]	Groceries To Go	1.00 Boxes/Bags	1. Groceries To Go
[Barcode]	Senior Basket	1.00 Boxes/Bags	2. Senior Basket
[Barcode]	Diaper Size 1	1.00 Package	3.1 Diaper Size 1
[Barcode]	Diaper Size 2	1.00 Package	3.2 Diaper Size 2
[Barcode]	Diaper Size 3	1.00 Package	3.3 Diaper Size 3
[Barcode]	Diaper Size 4	1.00 Package	3.4 Diaper Size 4
[Barcode]	Diaper Size 5	1.00 Package	3.5 Diaper Size 5
[Barcode]	Diaper Size 6	1.00 Package	3.6 Diaper Size 6
[Barcode]	Summer Meals	1.00 Boxes/Bags	4. Summer Meals
[Barcode]	Senior Basket Verbal Recertification	1.00 Unit	5. Senior Basket Verbal Recertification
[Barcode]	CalFresh Follow Up	1.00 Unit	8. CalFresh Follow Up

The amount of barcodes will depend and differ based on what you are offering at your site. For example, you might only offer “produce”, “food pantry”, etc. If you only offer “food pantry”, then this would be the only barcode you would see displayed.

15. Click on the appropriate option by selecting the blue writing and the following screen will appear:

Barcode Mode

Open this window whenever a barcode is scanned AVAILABLE BARCODES

Marta [REDACTED] VIEW CASE

[REDACTED] **DOB:** [REDACTED]
Living in Household: 1
Date of Last Assistance: Aug. 13, 2021

Site Name — McDowell Elementary
School SP
Proxy 1 — [REDACTED]
Proxy 2 — [REDACTED]
Number of Household Members — 4

Case ID: [REDACTED]
No notes
ADD NOTE +

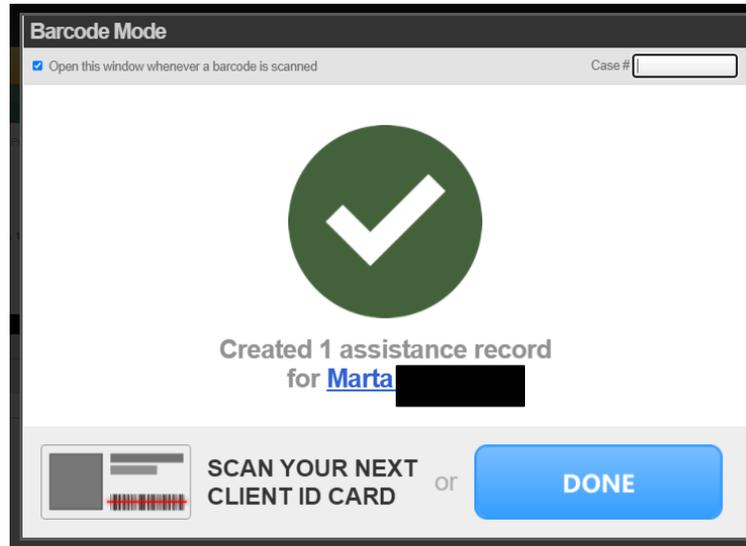
ITEM NAME	AMOUNT / UNIT	
Groceries To Go <small>Assistance: 1. Groceries To Go</small>	1.00 Boxes/Bags	✘

CONFIRM ASSISTANCE
click here or press SHIFT + ENTER **CANCEL**

NEW — Scan a special barcode to confirm assistance! - [Learn more](#)

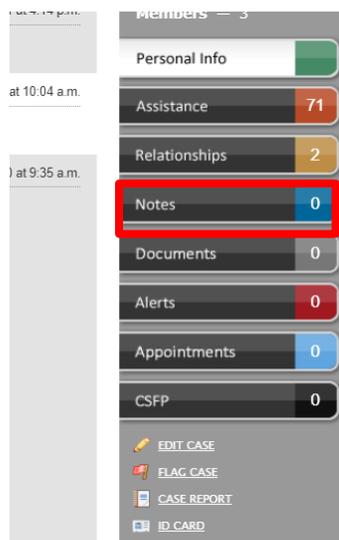
If the desired assistance is correct on the screen, please confirm assistance. In the example listed above, the participant is receiving “Groceries To Go”. Confirm assistance by clicking on the green “CONFIRM ASSISTANCE” label. What is listed under item name will vary and depend on what type of assistance you are offering at your site.

Once you confirm assistance, the following screen will appear:

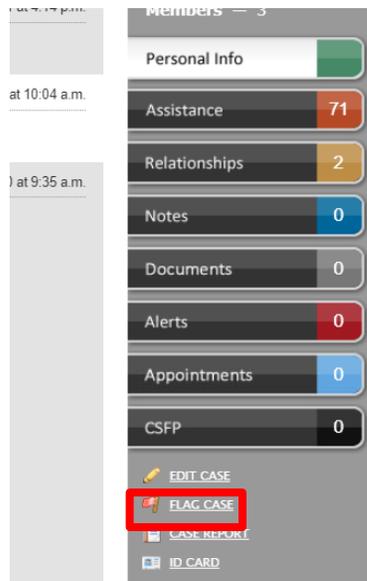


From here, you can either scan your next client ID card, or click done which will bring you back to the participant's case.

16. Within Oasis, you can also add notes to a client's profile. You can add a note by clicking on "Notes" on the bottom right hand corner on the main page. An example of a note would be if the client did not provide a phone number during the registration process. Note could be "please verify phone number". It is a good practice to look and see if any participant has a note added to their profile when we scan someone as part of the check in process.



17. Within Oasis (W5), we can also flag a case. We flag a case by clicking on “Flag Case” on the bottom right hand corner of the main page of the profile:



Some of the reasons we might want to flag a case is because someone might be part of another household and we need to merge their case. Another example could be that one household has two scan cards and we need to delete one so that they only receive one assistance versus two since they are part of the same household. When a case is flagged, an email goes to the person whose email was used to log into W5. An email also goes out to an admin group that will handle the flagged case from this point on.