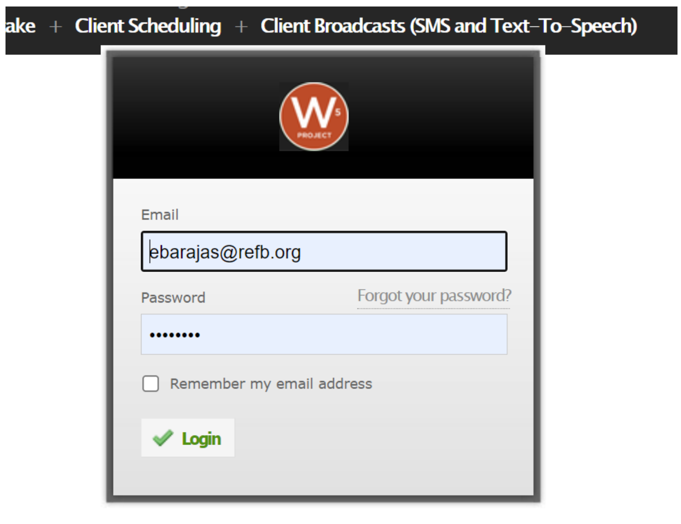
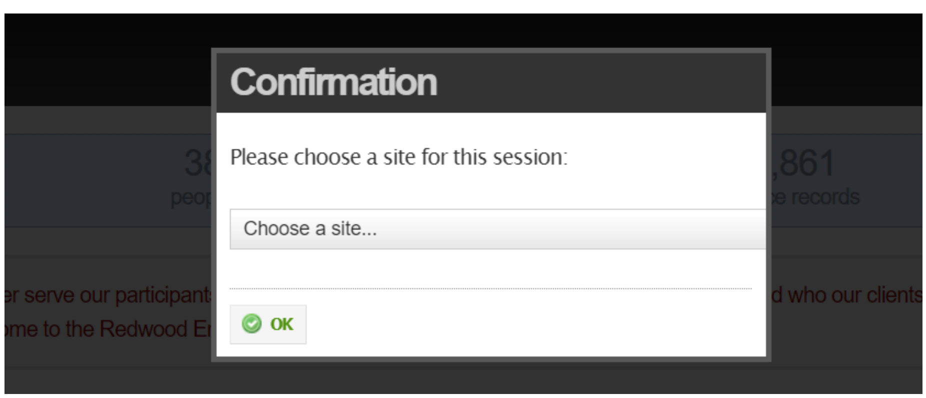
Work Instructions for: Charity Tracker Pro + Oasis Insight Pro (W5)

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.

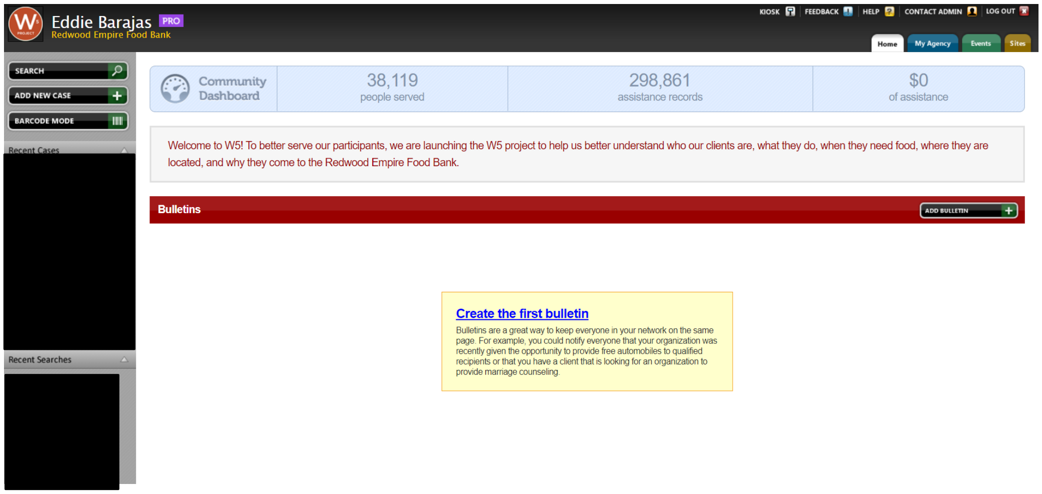
2. Log into W5 using the email account and password associated with that account.



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.

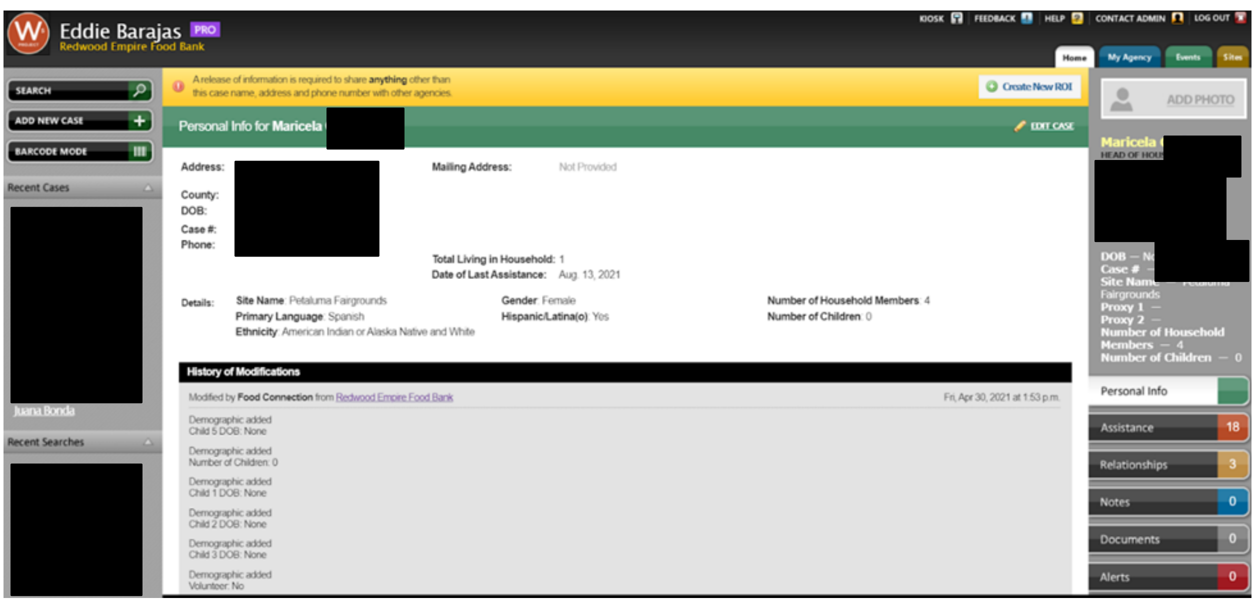


4. Oasis Overview (Main Screen)

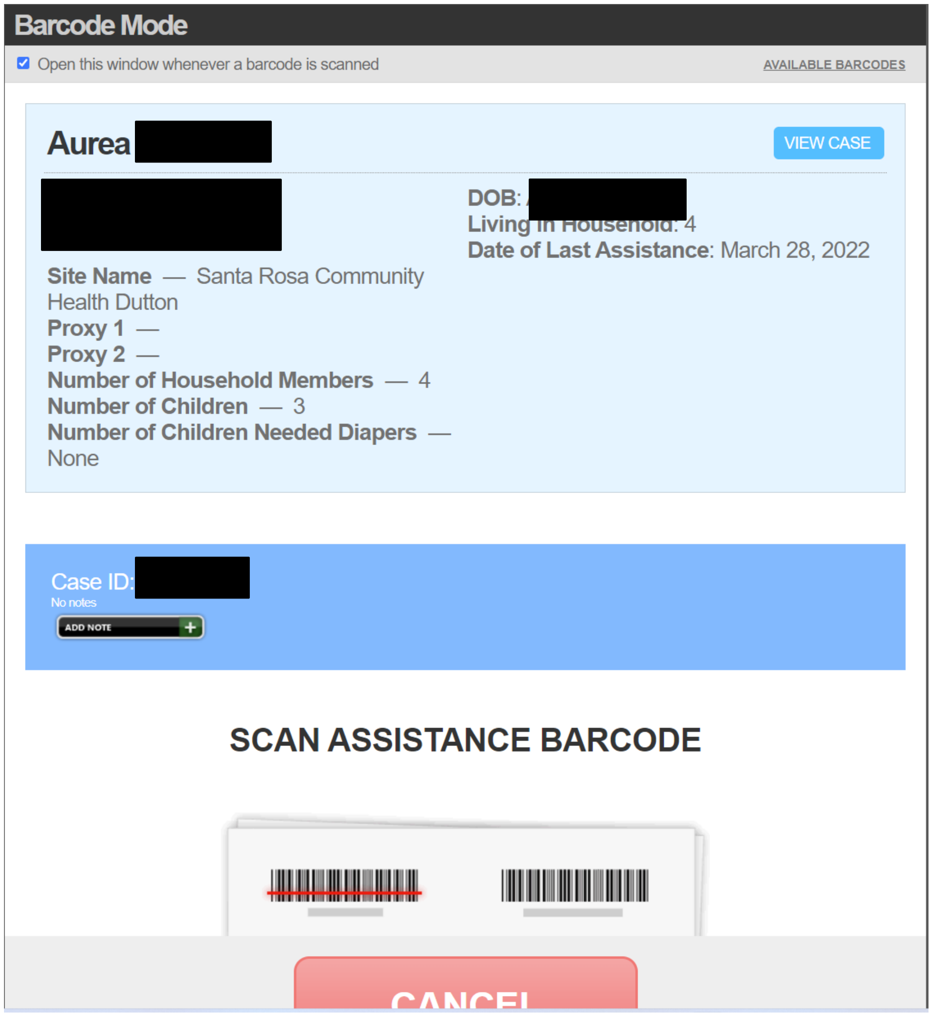


5. From this point on, you can start scanning someone for assistance, search someone in Oasis or add a new case.

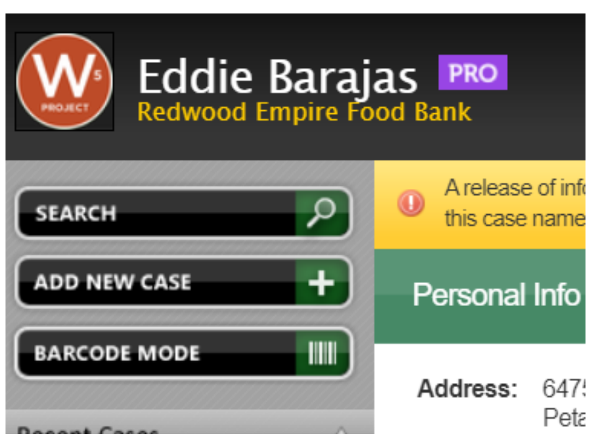
6. If someone is already registered with us and has a profile created in Oasis (W5), when you scan a card, the following screen will be displayed:



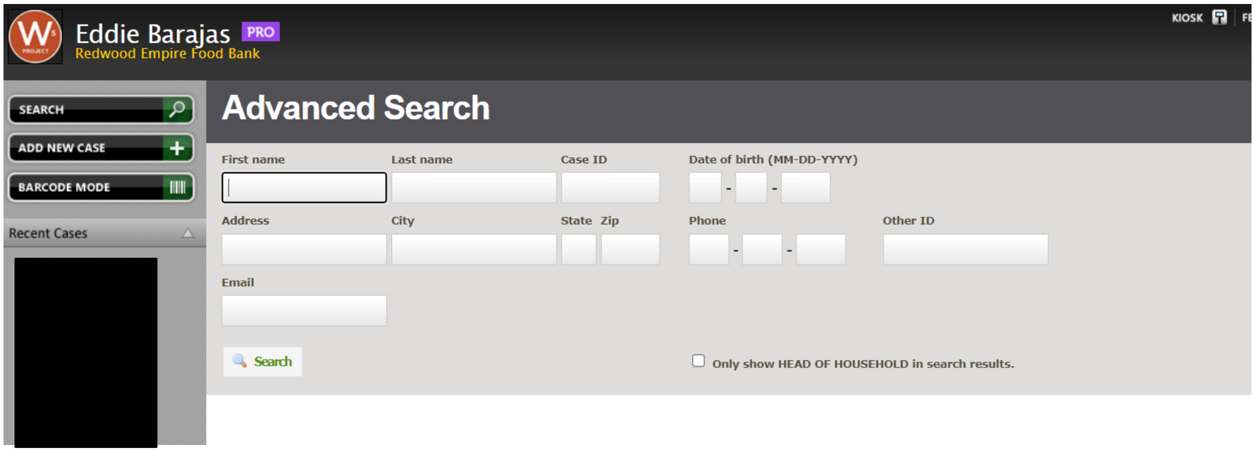
7. If you previously selected “Open this window whenever a barcode is scanned” the following will be displayed. If you do not want to have this screen open up, then you can uncheck the box and you will get the screen below step 6 instead.



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

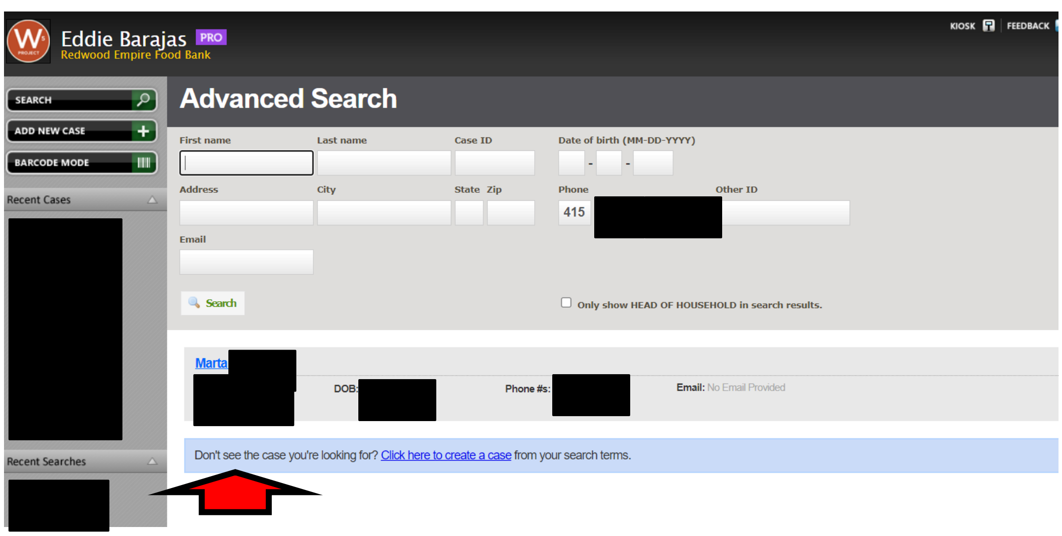


9. If you click on search, the following screen will appear:



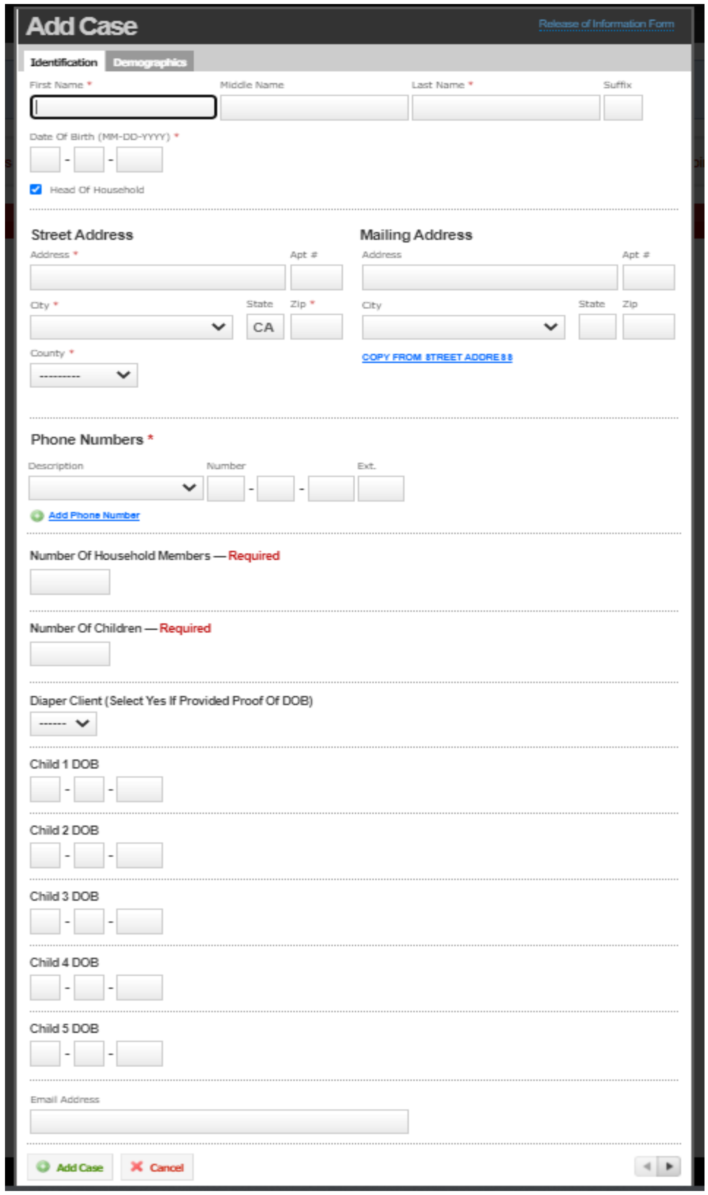
From here, you can seach by any of the fields that are listed. Usually, the easiest way to search for someone is with their phone number as this tends to be unique. Second good option would be to search by DOB, and lastly would be by first and last name.

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



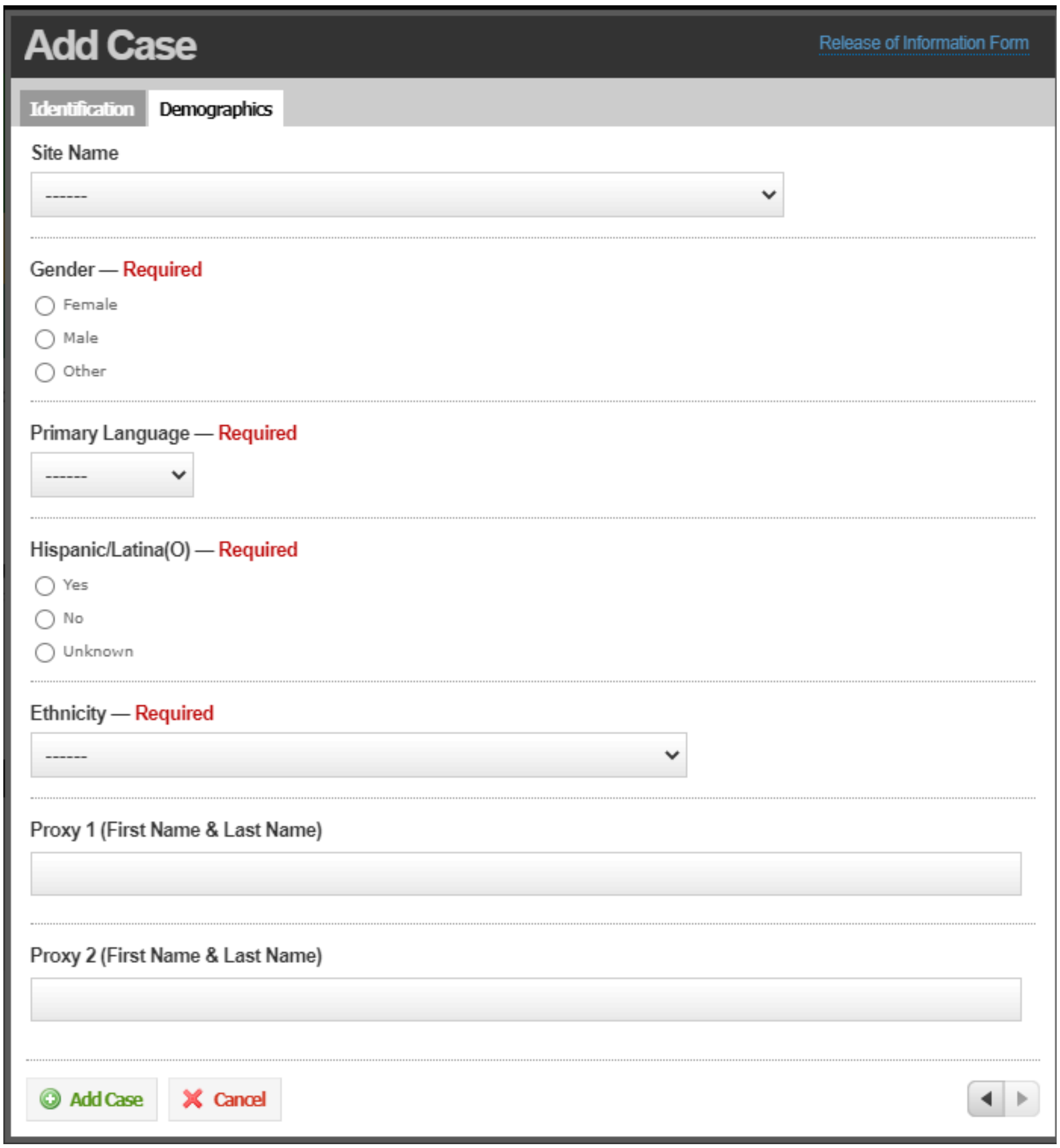
From here, you would select the name of the participant at the bottom of the screen highlighted in blue. Once you select the name of the participant, you will be brought over to the picture below step 6 from which you can start issuing assistance.

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



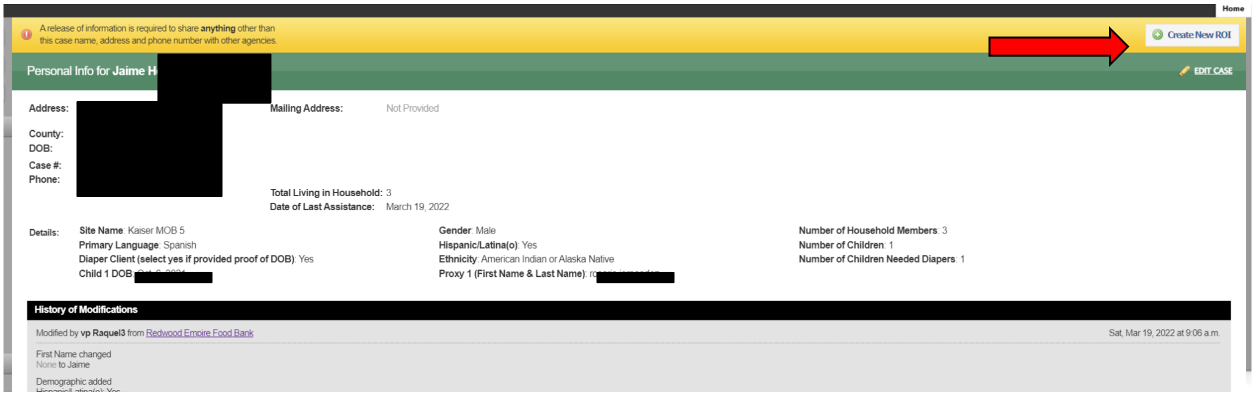
To add a new case, fill out all of the required fields shown with a red asterisk. Please note there are two pages to fill out when creating a new case. First page is the identification page. On page 1 you can also add the number of children in the household. If your agency is offering diapers, you can 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.

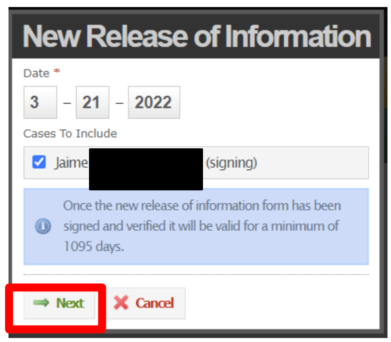


Once the second page has been completed, click on “Add Case”. You will then be brought back to the main page.

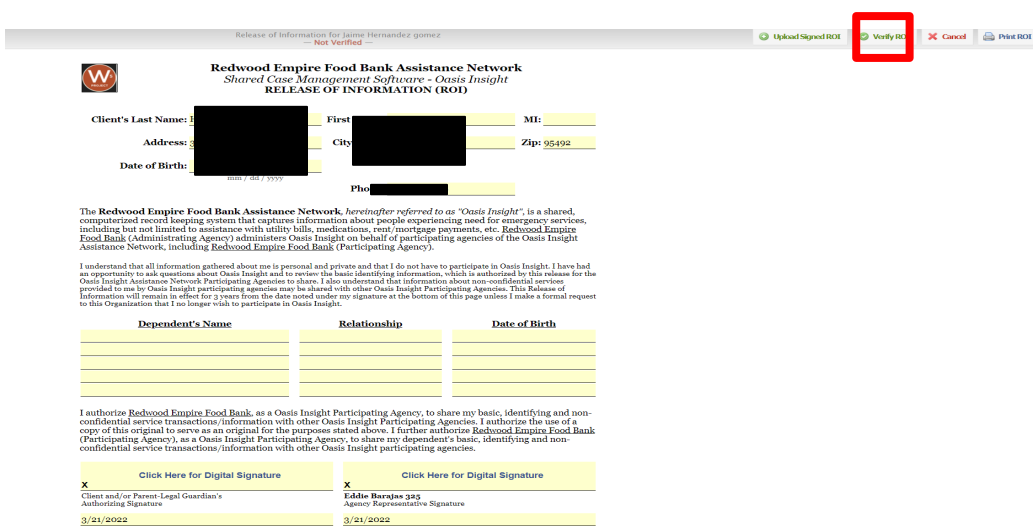
12. Once you are on the main page, the next step is to create an ROI (release of information). Click on Create New ROI on the top right hand corner.



On the following window, click next:

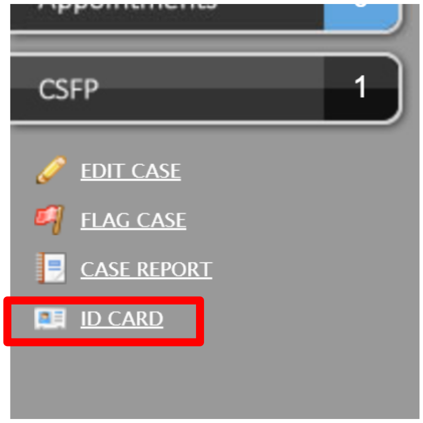


On the following page, click verify ROI on top right hand corner:

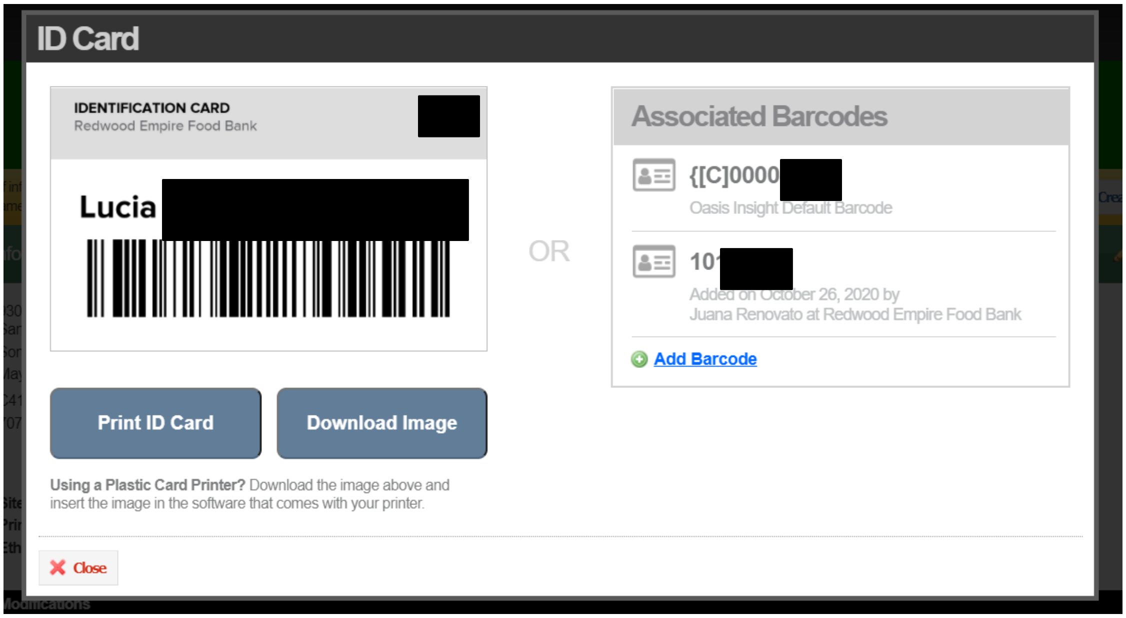


On the next screen, you will get a confirmation page, click “yes”. The yellow banner on top of the sheet alerting you of creating an ROI, should now be gone.

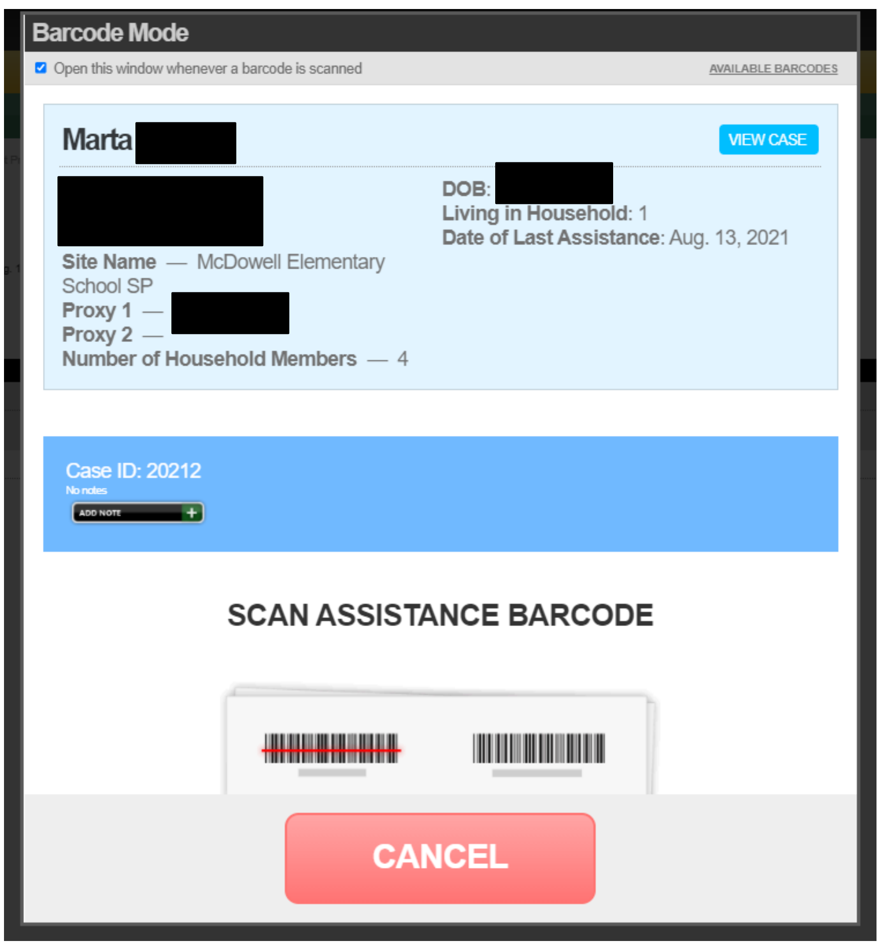
13. Once a profile has been created, you will need to assign an ID card to the participant. Click on “ID Card” on the bottom right hand corner.



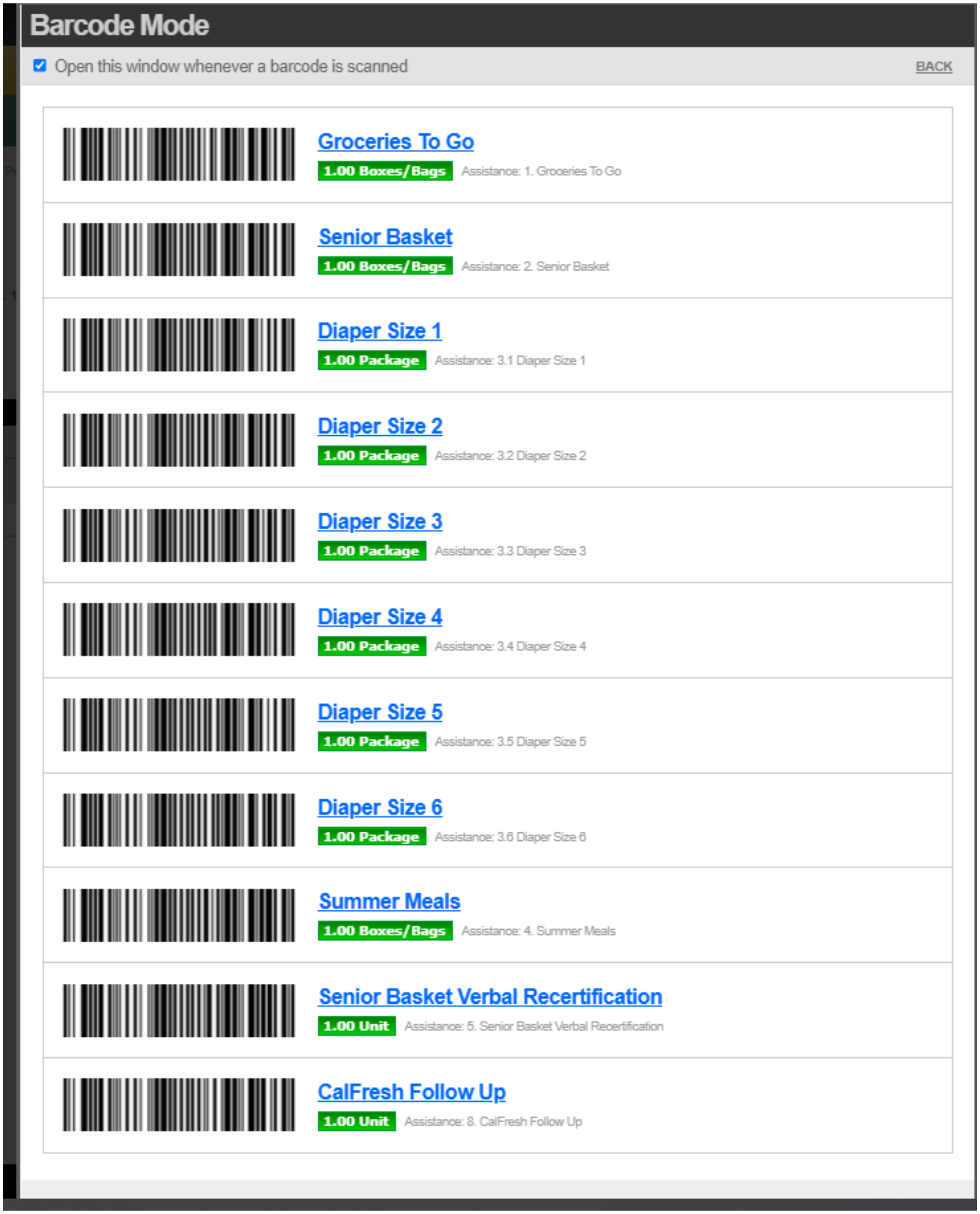
Click on “add barcode” and follow the instructions on the screen. It will ask you to scan the barcode twice. It is important to scan the barcode twice to confirm that the scan card has been activated. You can also add a barcode number manually by entering the number on the card you are giving to the 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:

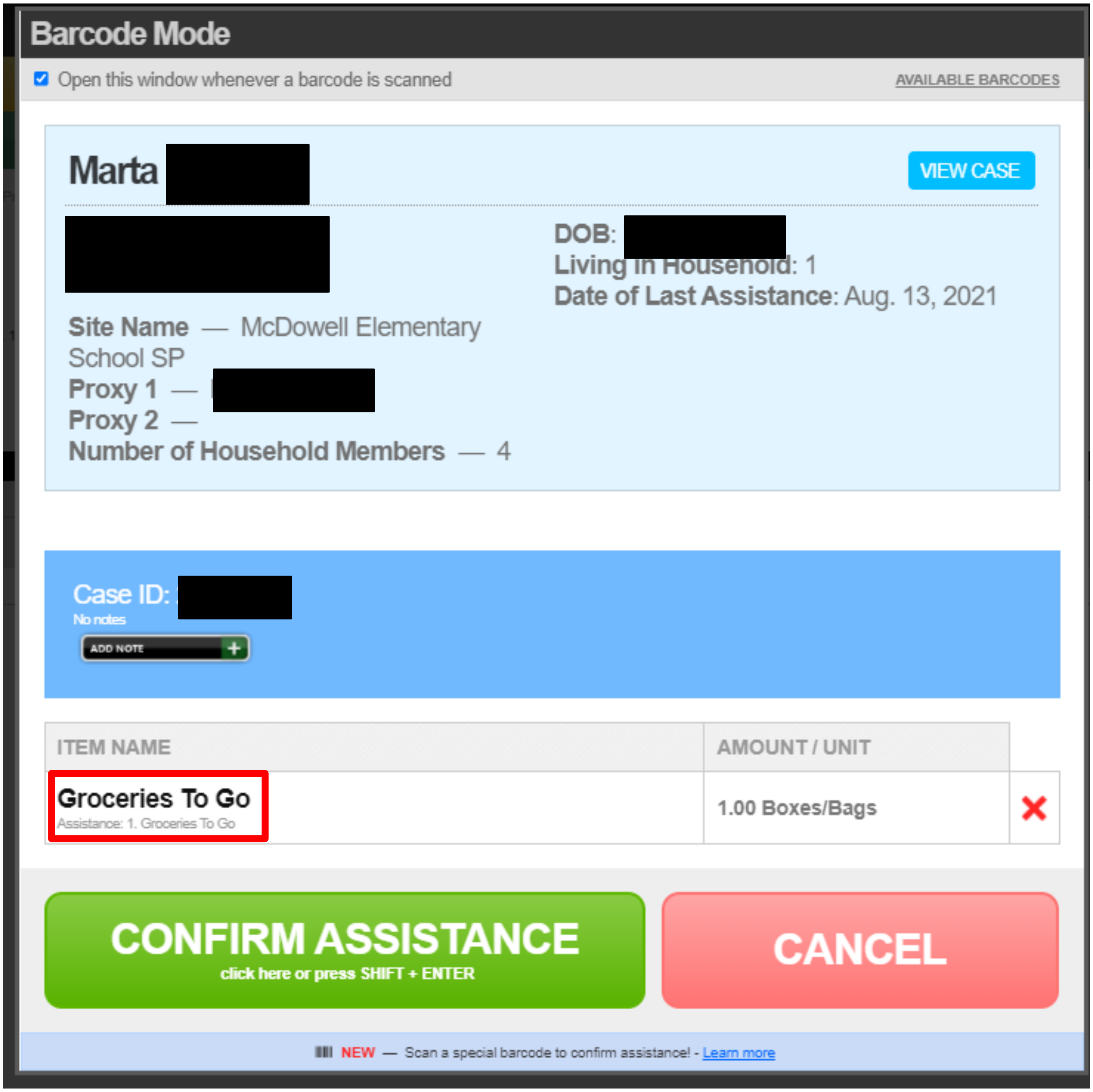


From this screen, select available barcodes on the top right corner. Once you select this option, the following screen will appear: (This portion will be different for Partners depending on your own programs.)



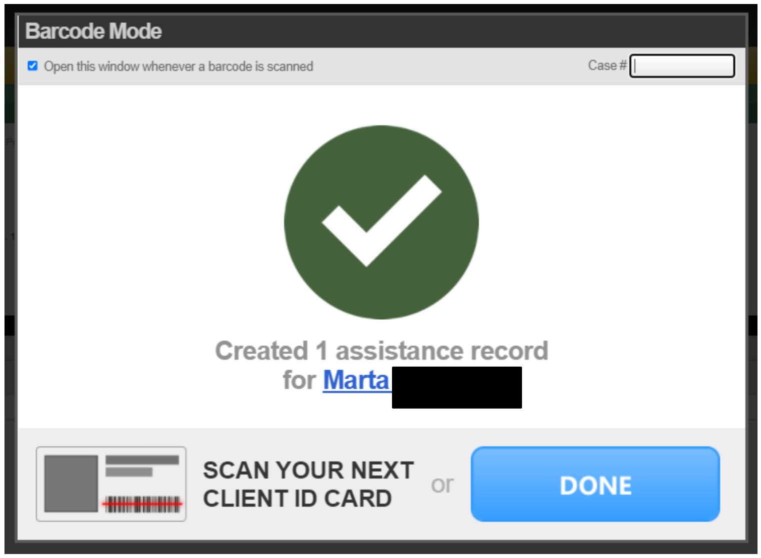
The amount of barcodes will depend and differ based on what you are offering at your site. For example, you might only offer “produce”, “food pantry”, etc. If you only offer “food pantry”, then this would be the only barcode you would see displayed.

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



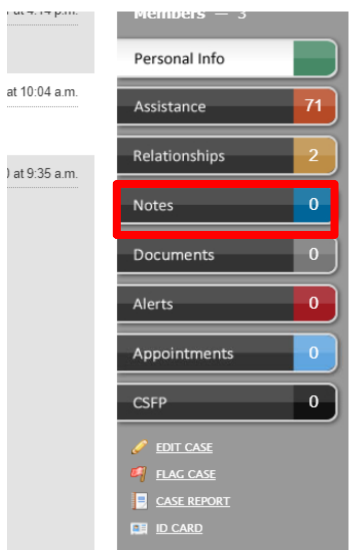
If the desired assistance is correct on the screen, please confirm assistance. In the example listed above, the participant is receiving "Groceries To Go". Confirm assistance by clicking on the green "CONFIRM ASSISTANCE" label. What is listed under item name will vary and depend on what type of assistance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

Once you confirm assistance, the following screen will appear:

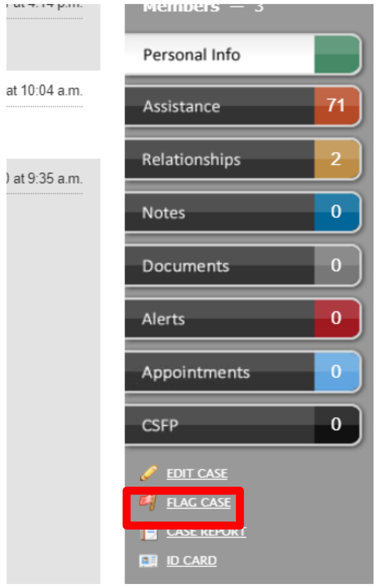


From here, you can either scan your next client ID card, or click done which will bring you back to the participant's case.

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, and 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.