Reports

Partners

As partners you will only have access to your organization's sites and or locations when running reports.

Dedupe or Merge Case

- ❏ From Oasis email notification, select the client name.
- ❏ Merge case > Type the client name > Select the client name.
- ❏ Choose the appropriate field > Merge case.

Assistance Report

- ❏ Admin > Reports.
- ❏ Under Saved Reports > Assistance Report.
- ❏ Click Edit > In the name, change date.
- ❏ Save & Continue
- ❏ Select the format of the report - if you are planning to amend the report, select csv. Table format has a nice view and can be saved in pdf but cannot be sorted.
- ❏ Select Filter by Date Assistance > Enter the dates of assistance.
- ❏ Number of Times Assisted > Leave the max to 5.
- ❏ Amount of Assistance > Leave the max to 5.
- ❏ Filter by Assistance Category > Food > For **Chappy's Report**, select "Senior Basket". Select other programs as needed.
- ❏ If you need to filter by site, go to Demographic Profile Match > Select the Site.
- ❏ Select Save & Continue.
- ❏ *If you choose CSV, there's a few mins wait period. You'll get an email from Oasis when the report is ready for download. The advantage is it can be filtered.* CSV can be opened using Google Sheet or Excel. To do that > In Google drive, Select New > Select Google Sheet > File > Open > Upload.

EFA 7 Signature Sheets

- ❏ Admin > Reports.
- ❏ Under Saved Reports > EFAP Signature Sheet.

- ❑ Click Edit > In the name, change date.
- ❑ Save & Continue
- ❑ EFAP Signature Sheet.
- ❑ Select Filter by Date Assistance > Enter the dates of assistance.
- ❑ Number of Times Assisted > Leave the max to 5.
- ❑ Amount of Assistance > Leave the max to 5.
- ❑ Save & Continue.
- ❑ Save and Request Updated File.

Household Breakdown EFAP

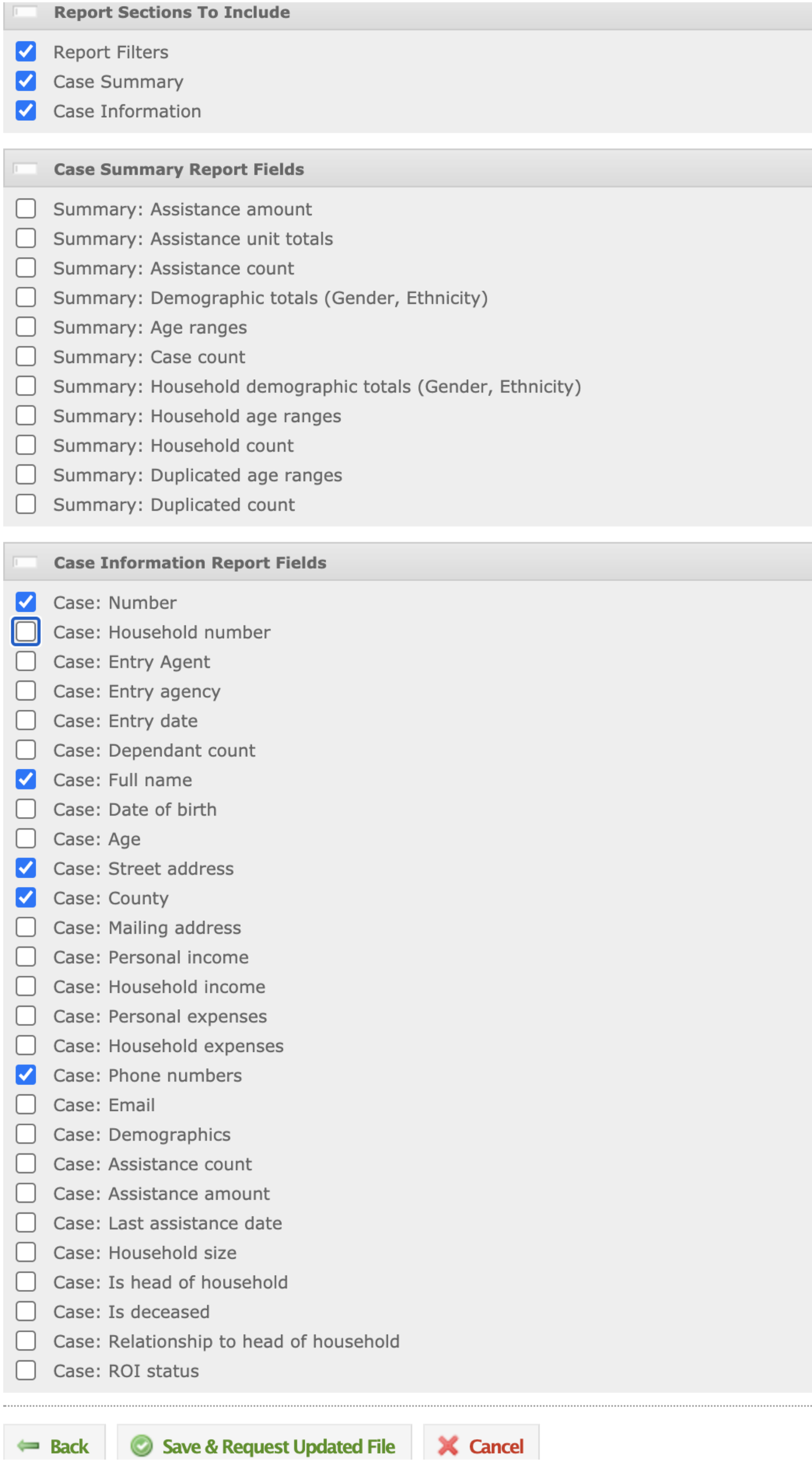
- ❑ Admin > Reports.
- ❑ Under Saved Reports > Household Breakdown EFAP..
- ❑ Click Edit > In the name, change date.
- ❑ Save & Continue
- ❑ Select Filter by Date Assistance > Enter the dates of assistance.
- ❑ Select `Include households assisted during date range (new and repeat recipients)`
- ❑ Number of Times Assisted > Leave the max to 5.
- ❑ Amount of Assistance > Leave the max to 5.
- ❑ Save & Continue.
- ❑ Save and View Report.

Roster/Client List Report

- ❑ My Agency Offline.
- ❑ Create Offline Report
- ❑ Name your report. I usually name it to match the site name I'm going to select and date it.
- ❑ Save & Continue
- ❑ The report will be listed and ready for download. The download is in Excel format but you can use Google Sheet to open it.
- ❑ After the distribution enter the assistance amount and the category from the pull down menu. If more than one category of assistance was given, copy the case and paste to a new line.
- ❑ Go to File > Select Download > Excel (xsls).
- ❑ To upload, go back to Offline Export > Select upload > Choose that file > Upload and Import. If you make a mistake, undo.
- ❑ To double check, enter one of the cases and go to Assistance.

*The upload can only update the Assistance Amount and Category.

- ❑ You can customize your fields in Report Filter.



- ❑ Select Save & Request Updated File.
- ❑ Reports can also be saved by Selecting Add to Saved Report.

- ❑ To regenerate the same report but different site, select Edit. Repeat above steps but re-select the site.
- ❑ CSV can be opened using Google Sheet or Excel. To do that > In Google drive, Select New > Select Google Sheet > File > Open > Upload. **If you choose CSV, there's a few mins wait period. You'll get an email from Oasis when the report is ready for download.*

Notes or Alert Report

- ❑ My Agency > Reports.
- ❑ Select Add Report.
- ❑ Name the Report e.g., "Alert Report" or "Notes Report".
- ❑ Report type > Select either Notes or Alert.
- ❑ There are 3 options List/Table/CSV.
    - ❑ CSV can be opened using Google Sheet or Excel. To do that > In Google drive, Select New > Select Google Sheet > File > Open > Upload. If you choose CSV, there's a few mins wait period. You'll get an email from Oasis when the report is ready for download.
    - ❑ List is comprehensive with description of the alert. You can print or pdf.
    - ❑ Table is a nice way to see all the alerts but it does not have a description of the alert.
- ❑ Filter by Date > Enter date range > You may filter more
- ❑ Save & Continue
- ❑ Select/Deselect fields where needed.
- ❑ Save & View Report.