



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 (xls).
- 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.

Report Sections To Include

- Report Filters
- Case Summary
- Case Information

Case Summary Report Fields

- Summary: Assistance amount
- Summary: Assistance unit totals
- Summary: Assistance count
- Summary: Demographic totals (Gender, Ethnicity)
- Summary: Age ranges
- Summary: Case count
- Summary: Household demographic totals (Gender, Ethnicity)
- Summary: Household age ranges
- Summary: Household count
- Summary: Duplicated age ranges
- Summary: Duplicated count

Case Information Report Fields

- Case: Number
- Case: Household number
- Case: Entry Agent
- Case: Entry agency
- Case: Entry date
- Case: Dependant count
- Case: Full name
- Case: Date of birth
- Case: Age
- Case: Street address
- Case: County
- Case: Mailing address
- Case: Personal income
- Case: Household income
- Case: Personal expenses
- Case: Household expenses
- Case: Phone numbers
- Case: Email
- Case: Demographics
- Case: Assistance count
- Case: Assistance amount
- Case: Last assistance date
- Case: Household size
- Case: Is head of household
- Case: Is deceased
- Case: Relationship to head of household
- Case: ROI status

- 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.