

# Pulling Oasis Monthly Reporting Numbers

There are two ways a Partner Agency can pull their monthly reporting numbers in Oasis. The instructions below cover how to pull an *Assistance Report* (pg. 2) and a *Service Insights Report* (pg. 7). You can use either report to get the information needed to submit your monthly report.

For Oasis users you are asked to report the Total Households, Unique Households, Total Individuals, and Unique Individuals served. Here is a reminder of what this means:

- Total Households Served: This is the total number of households who received food in the month. This number is a duplicated number – each family should be counted every time they receive food from the pantry.
- Total Individuals Served: This is the total number of people who will benefit from the food received from the pantry during the month. This is also a duplicate number.
- Unique (Unduplicated) Households Served: This is the number of unduplicated households that receive food in the month. This means that you count the household one visit per month, even if they visit more than one.
- Unique (Unduplicated) Individuals Served: This is the total number of people who have benefited from the food received from the pantry during the month. This is an unduplicated number.

We hope this document is helpful to your agency. If you have any reporting questions, please email [research@centraltexasfoodbank.org](mailto:research@centraltexasfoodbank.org) and/or call the Agency Hotline at: 512-463-0708.

## How to Pull an Assistance Report:

Use these instructions to pull monthly reporting numbers, including Duplicated Households and Duplicated Individuals, to send to the Central Texas Food Bank.

## What Assistance Categories to Use

All agencies have been trained to log assistance when a neighbor receives food assistance at your pantry. Due to the type of assistance a pantry may provide, there are many Assistance Categories in Oasis that you can use to track the different kinds of assistance you provide.

**CTFB Recommendation:** For monthly reporting of food pantry assistance to the Central Texas Food Bank, we recommend using the “Food Pantry: Pantry Assistance” category, although we will be looking at all categories in the “Food Pantry” section.

**Add Assistance**

Be sure to verify this is the correct case for [REDACTED] using a form of identification.

Amount \*  Unit

Category [Manage Categories](#)

Provided By

**Note:** If you are giving out food for a specific program, i.e. Fresh Foods, CSFP, HOPE, please use those categories instead. Similarly, if you give out clothing or diapers and track that in Oasis, please do not use the “Pantry Assistance” category for that.

## Running a Monthly Assistance Report

To start, go to the **My Agency** tab, click on the **Reports** sub-tab, and click the **Assistance** report type.

The screenshot shows the top navigation bar with tabs: Home, My Agency (highlighted), Agencies, Events, and Admin. Below this is a sub-menu with tabs: General, Cases, Assistance (highlighted), Categories, Barcodes, Appointments, Broadcasts, Duplicate Cases, Reports (highlighted), Offline, and Billing. Below the sub-menu are three report selection cards: Assistance (View all or filter assistance provided by your agency.), Cases (View all or filter cases created by your agency.), and Categories (View all or filter categories and associated assistance records for your agency.).

On the Assistance Report popup, select the filters you need.

- For reporting purposes, you will want to filter on **the Date of Assistance** as shown below.
- If necessary, remember to filter for the type of **assistance category** if you are logging or providing assistance beyond food. Please be sure to include all food assistance categories you are logging in Oasis (Excluding special program categories such as HOPE, CSFP, FFFF).
- **Note:** If you don't select any assistance categories it will show all assistance categories.

## Choose Filters for Assistance Report

The screenshot shows the 'Choose Filters for Assistance Report' popup window. At the top, there is a checkbox for 'Include Private Assistance' which is checked. To the right, there is a 'Format:' section with radio buttons for 'List' (selected), 'Table', 'CSV', and 'Custom'. Below this, there are three filter sections. The first section, 'Filter By Date Of Assistance (Skip To Include All)', is highlighted with a green box. It contains 'Start Date (MM-DD-YYYY)' and 'End Date (MM-DD-YYYY)' fields. The start date is '07 - 01 - 2022' and the end date is '07 - 31 - 2022'. There is also a checkbox for 'Only include cases assisted for the first time since start date' which is unchecked. The second section is 'Filter By Number Of Times Assisted (Skip To Include All)' and the third is 'Filter By Amount Of Assistance (Skip To Include All)'. Each filter section has a plus icon on the right.

Filter By **Assistance Category** (Skip To Include All) 

-  **Client Services** 
-  **Clothing** 
-  **Counseling** 
-  **FFFF Assistance** 
-  **Food Pantry** 
  - Food Pantry: CTFB Home Delivery Partnership
  - Food Pantry: Food/Beverages
  - Food Pantry: Home Delivery
  - Food Pantry: Meal
  - Food Pantry: Meal Voucher
  - Food Pantry: Mobile Pantry
  - Food Pantry: Pantry Assistance**
  - Food Pantry: Personal Hygiene Items
  - Food Pantry: TEFAP [DO NOT USE]
  - Food Pantry: Test - Mobile Pantry Site
  - Food Pantry: Thanksgiving Meal
  - Food Pantry: [TESTING - DO NOT USE] CSFP Monthly Distribution

Scroll down and click **Next**

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On the “Choose Fields to Report” page, select “Summary: Duplicated count” in the “Assistance Summary Report Fields”, everything else can remain as is.

**Assistance Summary Report Fields**

- Summary: Assistance amount
- Summary: Assistance unit totals
- Summary: Assistance count
- Summary: Demographic totals (Household Size, Race/Ethnicity, Gender, Disability Status, Military (Current or Veteran))
- Summary: Age ranges
- Summary: Case count
- Summary: New case count
- Summary: Household demographic totals (Household Size, Race/Ethnicity, Gender, Disability Status, Military (Current or Veteran))
- Summary: Household age ranges
- Summary: Household count
- Summary: New household count
- Summary: Duplicated demographic totals (Household Size, Race/Ethnicity, Gender, Disability Status, Military (Current or Veteran))
- Summary: Duplicated age ranges
- Summary: Duplicated count

Scroll down and click “View Report”

Assistance: Other fields

[← Back](#) [✔ View Report](#) [✗ Cancel](#)

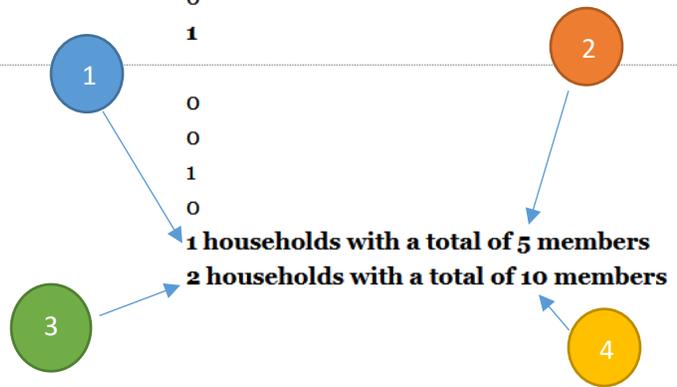
After the report loads, in the **Report Summary Section** at the top, find **“Total Households Assisted”** and **“Duplicated Households Assisted”**. The numbers you will report to CTFB are both found here: the number of households (unique and total) and the total members also known as individuals (unique and total).

**Report Summary**

Total Assistance: **\$ 0.00**  
 Assistance Records: 2

Children (0 - 17) Assisted: 0  
 Adult (18 - 64) Assisted: 0  
 Senior (65+) Assisted: 1  
 Other (unknown) Assisted: 0  
**Total Cases Assisted: 1**

Children (0 - 17) in Assisted Households: 0  
 Adult (18 - 64) in Assisted Households: 0  
 Senior (65+) in Assisted Households: 1  
 Other (unknown) in Assisted Households: 0  
**Total Households Assisted: 1 household with a total of 5 members**  
**Duplicated Households Assisted: 2 households with a total of 10 members**



In this report, you would submit:

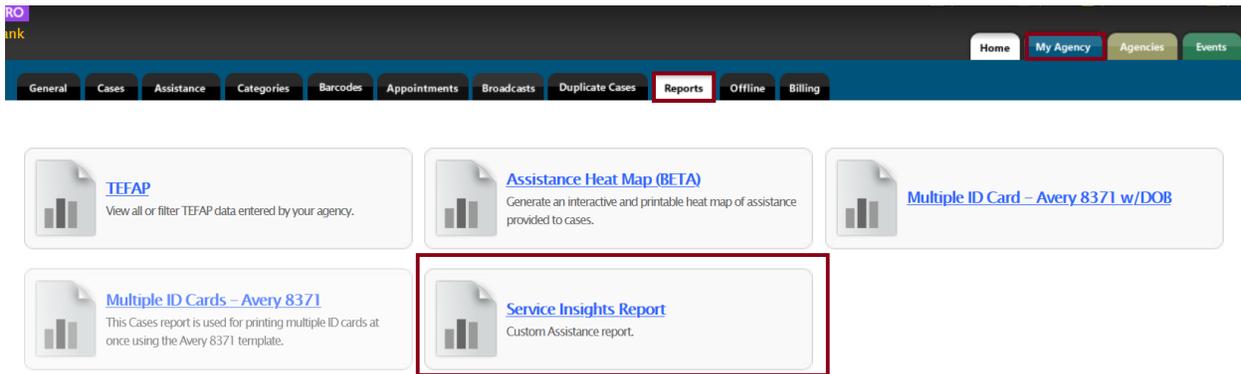
- 1 Unique Households: 1
- 3 Total Households Served: 2

- 2 Unique/De-duplicated Individuals: 5
- 4 Total/Duplicated Individuals Served: 10

## Alternate Monthly Report in Oasis (with Excel) – Service Insights Report

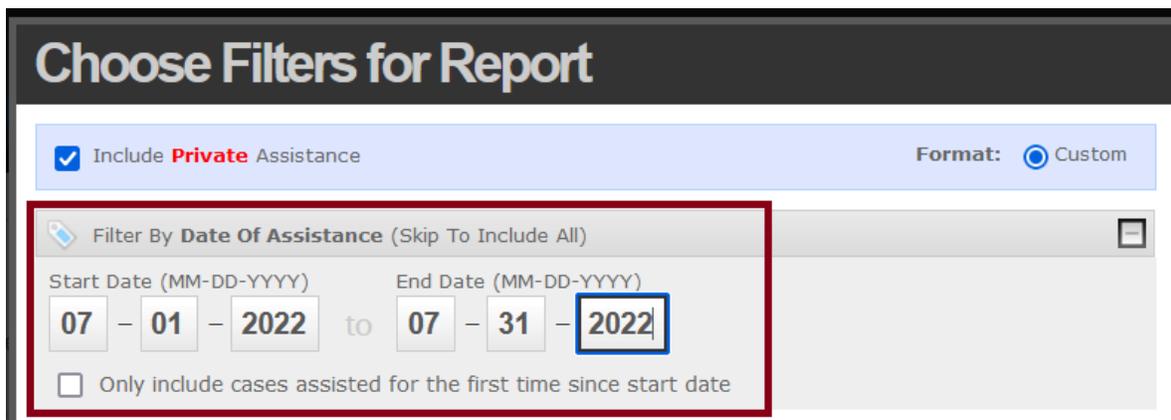
If you have access to Excel you can run the Service Insights Report to get these numbers as well. The benefit of the Service Insights Report is its clarity and additional demographic information.

To start, go to the **My Agency** tab, click on the **Reports** sub-tab, and click the **Service Insights Report**.



On the **Service Insights Report** popup, select the filters you need.

- For reporting purposes, you will want to filter on the **Date of Assistance** as shown below.  
If necessary, remember to filter for the type of **Assistance Category** if you are logging or providing assistance beyond food. Please be sure to include all food assistance categories you are logging in Oasis (Excluding special program categories such as HOPE, CSFP, FFFF).
- **Note:** If you don't select any assistance categories it will show all assistance categories.



Filter By Assistance Category (Skip To Include All)

- Client Services
- Clothing
- Counseling
- CSFP Assistance
- FFFF Assistance
- Food Pantry
  - Food Pantry: CTFB Home Delivery Partnership
  - Food Pantry: Food/Beverages
  - Food Pantry: Home Delivery
  - Food Pantry: Meal
  - Food Pantry: Meal Voucher
  - Food Pantry: Mobile Pantry
  - Food Pantry: Pantry Assistance
  - Food Pantry: Personal Hygiene Items
  - Food Pantry: TEFAP [DO NOT USE]
  - Food Pantry: Test - Mobile Pantry Site
  - Food Pantry: Thanksgiving Meal

Scroll down and click **Next**

→ Next      ✖ Cancel

Click **Request Report** on the next popup window

## Choose Fields for Report

Order Assistance By  
Oldest to Newest

Custom Template  
Service Insights Report

← Back     Request Report    ✖ Cancel

**Note:** Oasis will show a message that you will receive an email. Check your email to see the report (this may take a few minutes or longer depending on how large the report is).

**Assistance Report Requested**

Your Custom report request has been received. Once your report has processed, you will receive an email notification with a link to your Custom file ready for download.

You can continue to use Oasis Insight until the report is finished.



Once you receive the email click on the link to download your report. Log in if you haven't already.

**Custom Report Available for Download**

Thank you for your patience, Dave! To keep your data safe, we ask that you log in to your Oasis Insight Network using the following link: [Log in and download your Custom report](#)

Oasis Insight™ | (888) 764-0633 | [support@oasisinsight.net](mailto:support@oasisinsight.net)

Click the link that says "Right-click here" to download it, or right-click and choose "Save Link As...". Either way will download the CSV file.



**Your Custom Report is Ready to Download**

[Right-click here and choose "Save Link As..."](#)

Open the CSV file in Excel or Google Sheets ([here are instructions on how to import a CSV file to Google Sheets](#)).

<b>Central Texas Food Bank</b>	<b>Date Range:</b>	07/01/2022 - 07/31/2022
<b>Unique Households</b>		1
<b>Total Households</b>		2
<b>Unique Individuals</b>		5
<b>Total Individuals</b>		10
<b>New Unique Households</b>		0
<b>New Unique Individuals</b>		0

In the first section, find the fields **Unique Households, Total Households, Unique Individuals and Total Individuals**. From this report, you would submit:

- Unique Households: 1
- Unique Individuals: 5
- Total Households Served: 2
- Total Individuals Served: 10