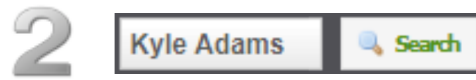


## Oasis Client Intake Guide



Begin by searching for your client. Select Search in the top-left corner.

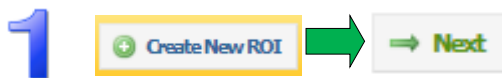


Make sure to type in their name correctly or it may not appear and select Search.

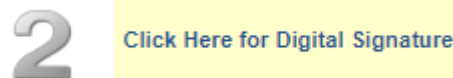


Select the client's name to enter their case.

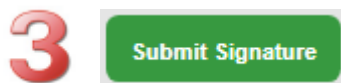
## Collecting an Annual Release of Information (RoI)



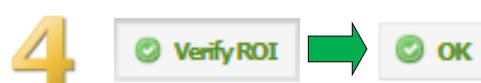
Select Create New RoI on the right-hand side of the yellow bar atop your client's case. Then, select Next.



Scroll to the bottom of the RoI and select Click Here for Digital Signature.



Have your client sign on the signature pad and select Submit Signature.

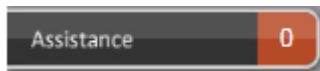


This will take you back to the RoI. Select Verify RoI in the top-right, then select OK.

**5** Next, have your client sign for their food under the Assistance tab.

## Collecting a Monthly Assistance Record

1



Select the Assistance tab on the right-hand side of your screen.

2

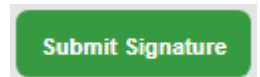


Select Add Assistance from the top-right corner.

3

Select the Category of food they're getting, then select Add in the bottom-left corner. **Be sure to select SFPP Only for your clients without a TEFAP qualifier!**

On the signature screen, have them sign the signature pad and select Submit Signature.

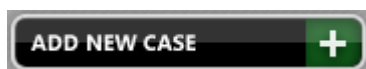


## Adding New Clients

If you can't find your client by searching their name, try searching by their street address.

If you're unable to find a client by name or street address, then you'll need to add a new case for them:

1



Select Add New Case from the top-left corner.

2

Answer at least the required questions in the Identification and Demographics tabs, then select Add Case from the bottom-left.

3

Now, collect a Release of Information (detailed on previous page) and add their monthly assistance record (detailed above).