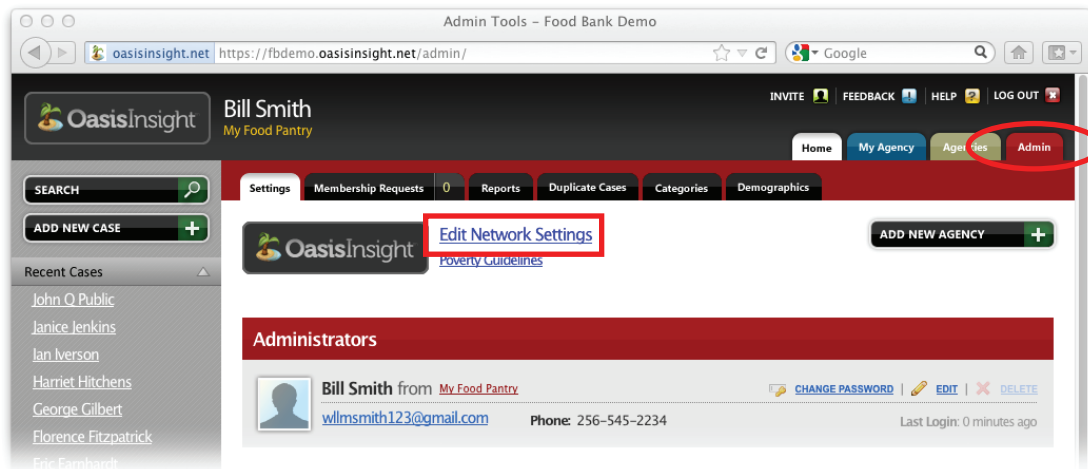


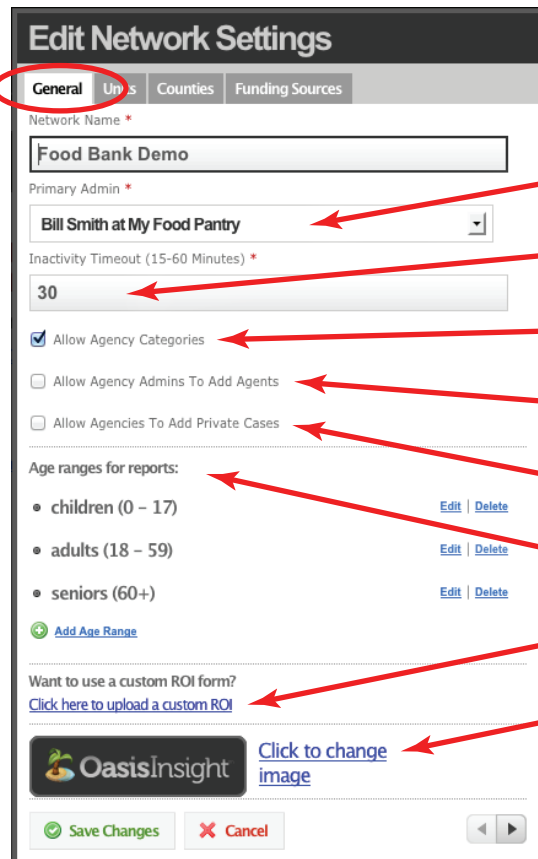


---

## **ADMIN Section**



The **Admin Tab** is where you keep track of your Oasis network. Let's start with the Settings sub-tab (displayed in the image above). When you will click the Edit Network Settings link (in the red square), the following window will open.



The Edit Network Settings window has four sections: General, Units, Counties, and Funding Sources. We'll start with the General Tab.

You define the primary administrator for your Oasis network here

Oasis will automatically log out after the number of minutes entered here.

Checking this box will allow Agency Administrators to create assistance categories for their agency.

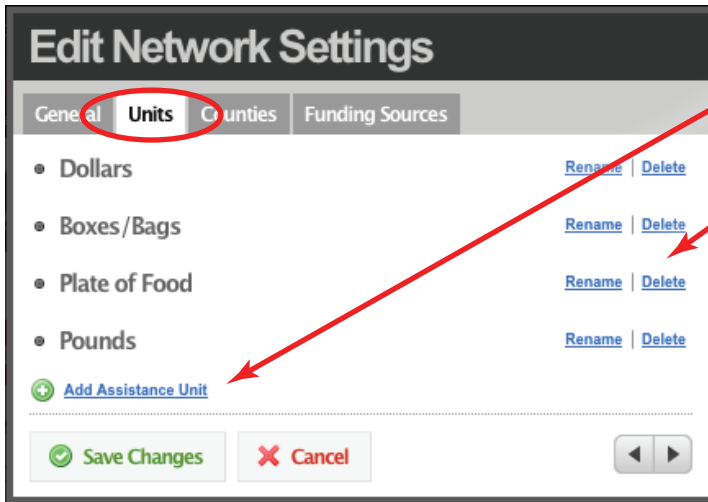
Checking this box will allow Agency Administrators to add agents to their agency.

Checking this box will allow agencies to make private cases for their agency.

Here is where you set the age ranges you need for running age-based reports.

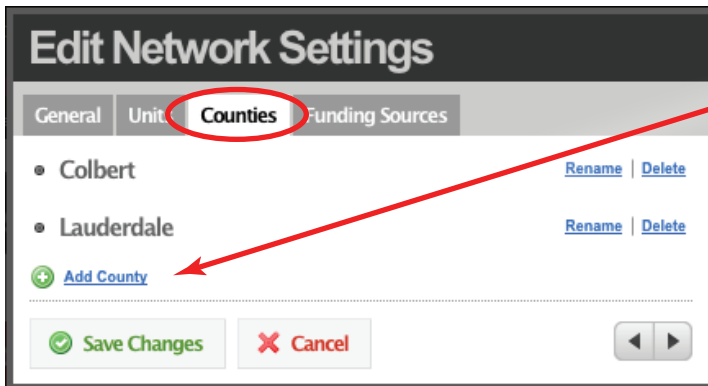
You can click this link to upload your own Release of Information form.

And you can click this link to upload your logo to Oasis.



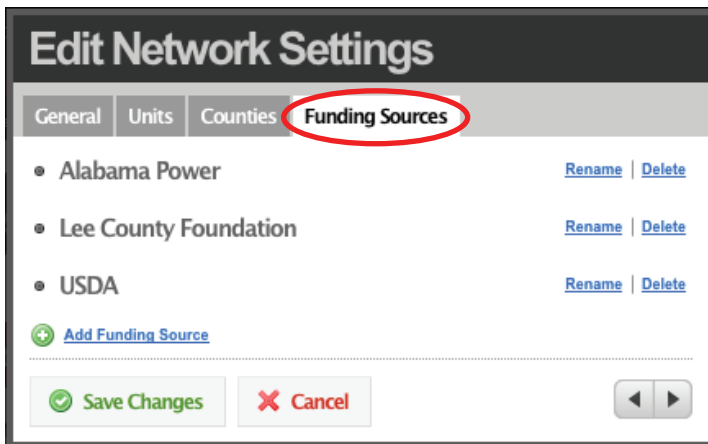
The Units section of the Network Settings window allows you to add custom units for your assistance records. You click the Add Assistance Unit link to add your units.

You can also rename or delete units if you need.



The Counties section of the Network Settings window allows you to define the counties your network serves. You can add as many counties as you need. Just click the Add County link and enter your counties.

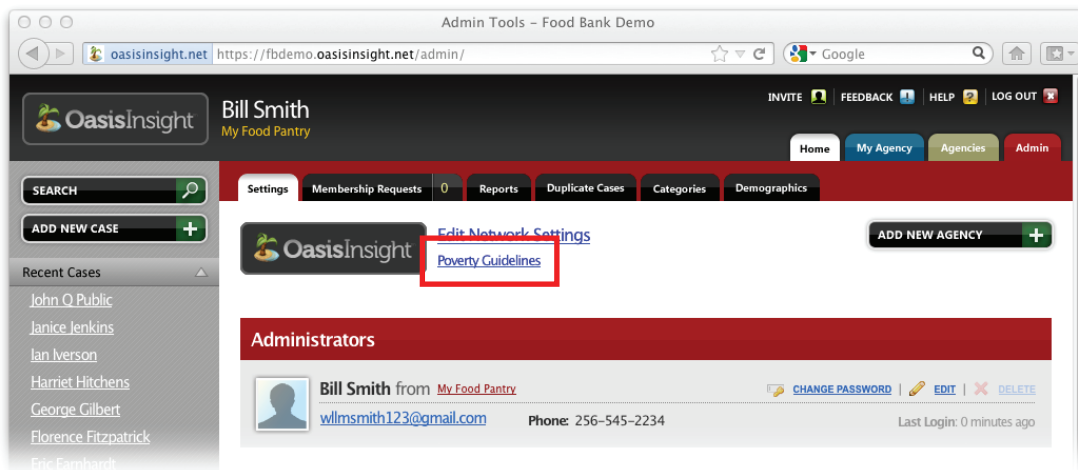
Again, you can rename or delete counties if you need to.



The Funding Sources section allows you to add funding sources for assistance records.

To add a funding source, click the Add Funding Source link and enter the name of the source.

**Tip:** You don't need to click the Save Changes button after each section. You can make changes in each section and click the Save Changes button when you are done.



The Poverty Guidelines feature allows you to define guidelines for your network. When you add income information for a client, that information will be compared to the poverty guidelines you set and will give you that client's percentage of poverty.

### Poverty Guidelines

Poverty Level (1 Person)

Poverty Level Adjustment (Each Addl. Person)

Household Size	Poverty Level (100%)
1	\$10890
2	\$14710
3	\$18530
4	\$22350
5	\$26170
6	\$29990
Additional members	Add \$3820 each

When you click the Poverty Guidelines link, a window will open where you can set the poverty level for one person. You also set the poverty level adjustment for each additional person.

Nickname: Not Provided

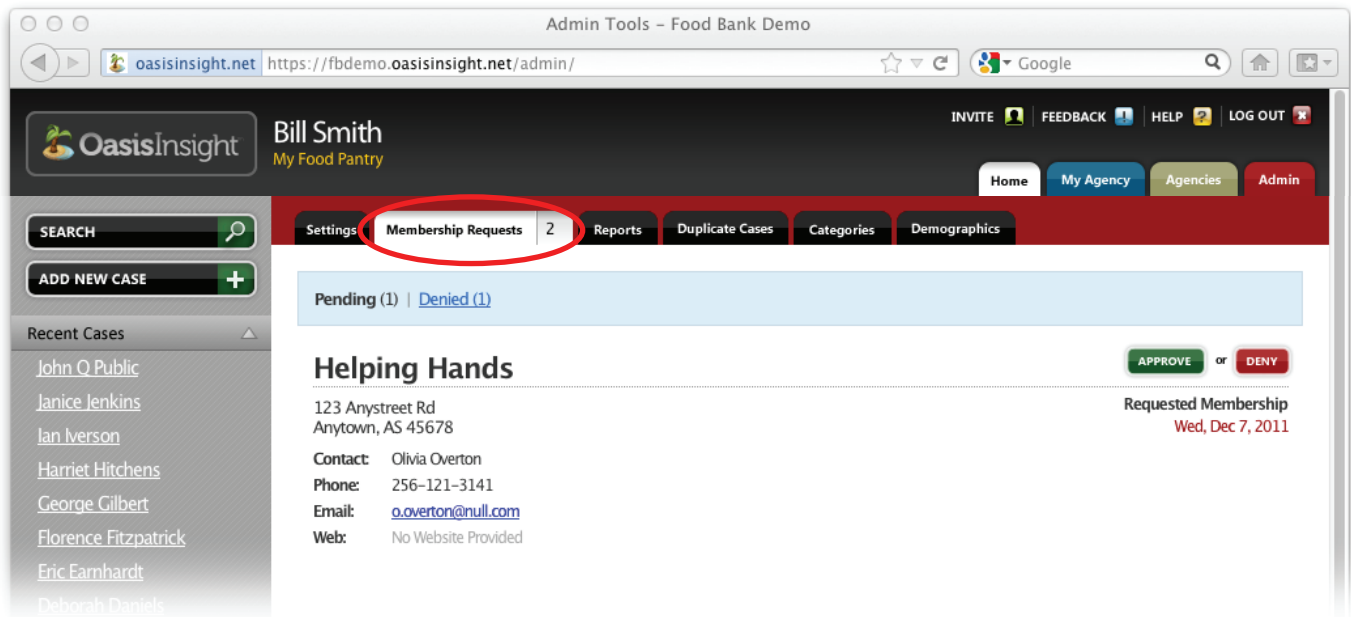
Personal Income: \$8736 yr (\$728 mo)

Household Income: **\$8736 yr (\$728 mo – 59% poverty)**

Personal Expenses: \$9384 yr (\$782 mo)

Household Expenses: \$9384 yr (\$782 mo)

You can see that when the poverty level is \$10,890, and a client has a household income of \$8736, their poverty percentage is 59%.



The Membership Requests sub-tab has two sections, one for Pending membership requests and one for Denied membership requests. When someone asks to join to your Oasis network, their request appears in the Pending section (shown above). If you click the Approve button, the following window will open.

## Approve Request

Approving this membership request will create a login for the request contact and add their agency to your network.  
A welcome email will be sent to the request contact that includes login information.

**Who will pay for this agency's use of Oasis Insight?**

☐ I Will Pay For This Agency  
☐ **This Agency Will Pay For Itself**

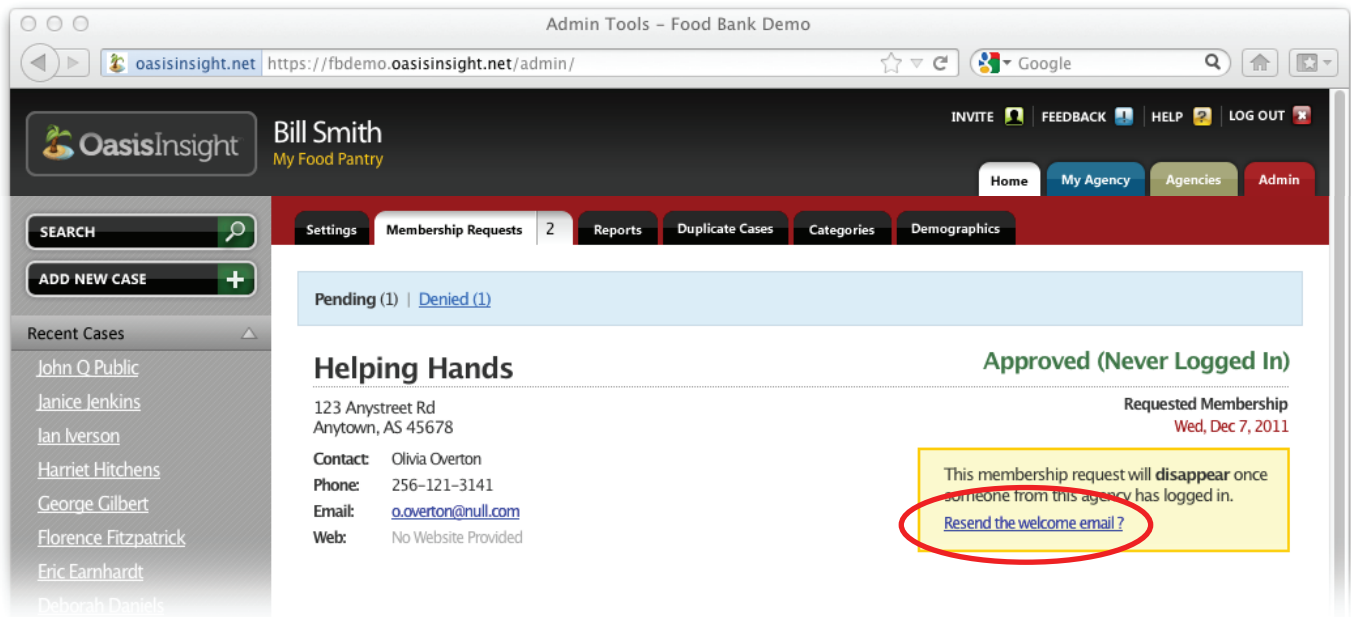
---

**Approve Request**

**Cancel**

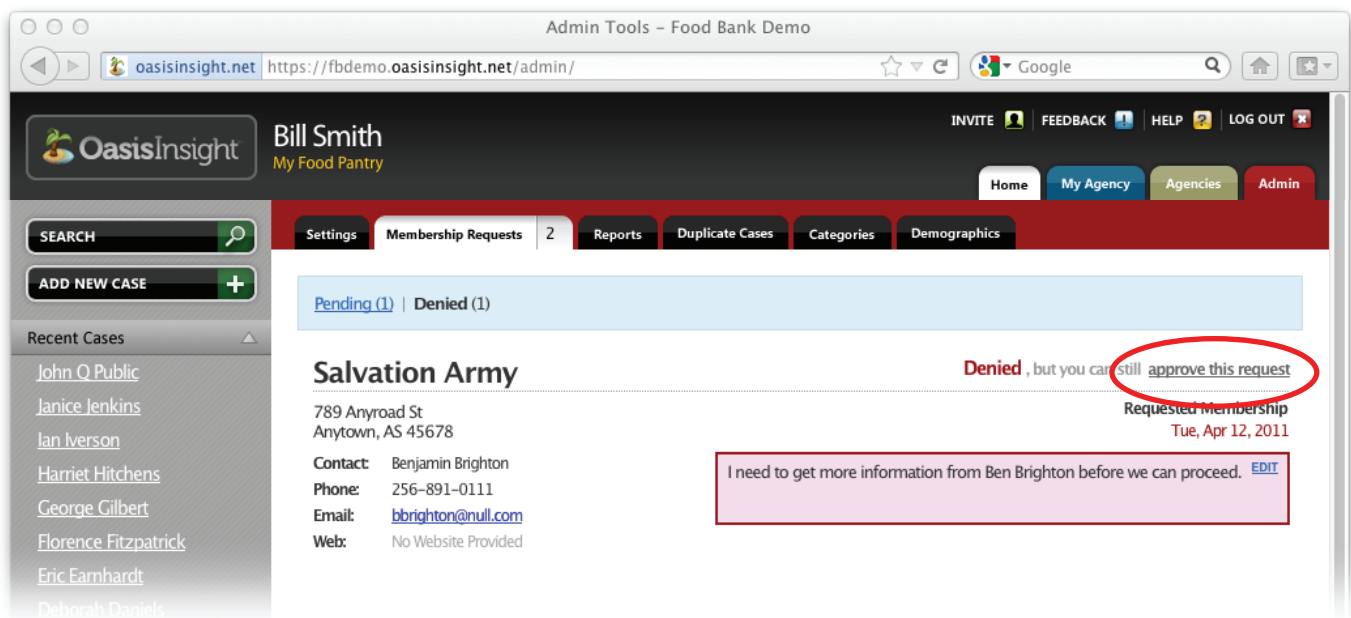
When you approve a membership request, Oasis will ask you who is planning to pay for the service.

If you select "This Agency Will Pay For Itself," the agency will receive an email with billing information.



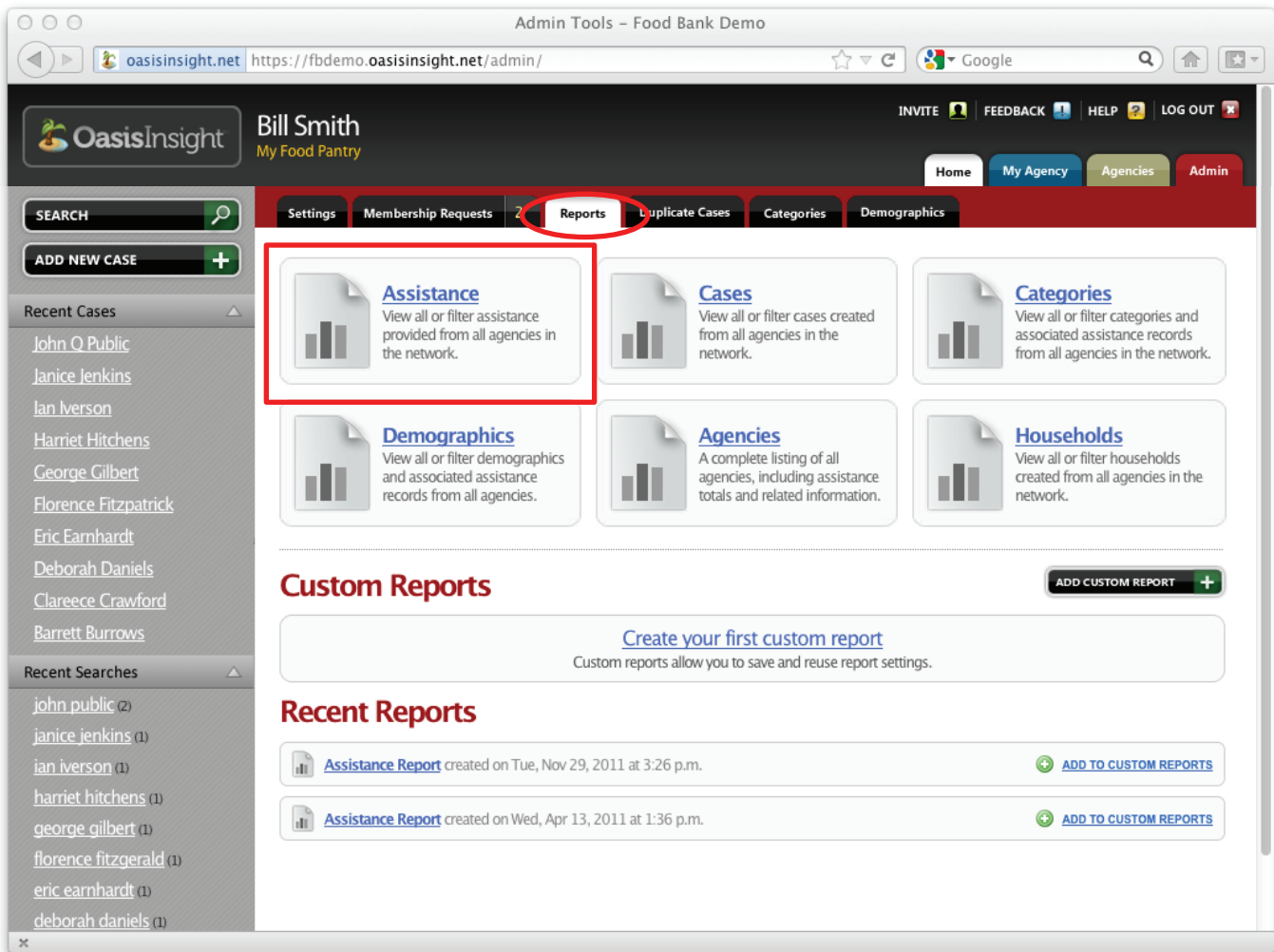
The screenshot shows the 'Admin Tools - Food Bank Demo' interface. The user is logged in as Bill Smith, My Food Pantry. The 'Membership Requests' tab is active, showing a list of requests. The 'Helping Hands' request is highlighted, showing details: 123 Anystreet Rd, Anytown, AS 45678. Contact: Olivia Overton, Phone: 256-121-3141, Email: o.overton@null.com, Web: No Website Provided. The request is in the 'Pending (1)' state. A yellow box highlights the text: 'This membership request will disappear once someone from this agency has logged in. [Resend the welcome email?](#)'.

After you approve the agency, they will get an automatic welcome email with their log in information. Their request will stay in the Pending list until they log in for the first time. If they tell you they haven't received the email, suggest that they look in their spam folder as some email programs send the automatic email there. If they still can't find the welcome email, you can re-send it by clicking the link circled above.



The screenshot shows the 'Admin Tools - Food Bank Demo' interface. The user is logged in as Bill Smith, My Food Pantry. The 'Membership Requests' tab is active, showing a list of requests. The 'Salvation Army' request is highlighted, showing details: 789 Anyroad St, Anytown, AS 45678. Contact: Benjamin Brighton, Phone: 256-891-0111, Email: bbrighton@null.com, Web: No Website Provided. The request is in the 'Denied (1)' state. A red box highlights the text: 'Denied, but you can still [approve this request](#)'. Below this, a pink box contains the text: 'I need to get more information from Ben Brighton before we can proceed. [EDIT](#)'.

When you deny an agency, their request will appear in the Denied section of the Membership Requests tab. You can make a note of why you denied their request if you would like. It is still possible to approve the request if necessary, just click the link circled above.



The screenshot shows the OasisInsight Admin Tools interface for a Food Bank Demo. The user is logged in as Bill Smith, My Food Pantry. The top navigation bar includes links for INVITE, FEEDBACK, HELP, and LOG OUT. The main navigation bar has tabs for Home, My Agency, Agencies, and Admin. The 'Reports' sub-tab is highlighted with a red circle. Below the navigation bar, there is a sidebar with a search bar and a list of recent cases and searches. The main content area displays six report categories in a grid: Assistance, Cases, Categories, Demographics, Agencies, and Households. The 'Assistance' report is highlighted with a red box. Below the grid, there is a 'Custom Reports' section with a 'Create your first custom report' button and a 'Recent Reports' section listing two 'Assistance Report' entries with 'ADD TO CUSTOM REPORTS' buttons.

The Reports sub-tab is where you go to run all the reports that pertain to your agency. There are six categories to report on (see the picture below).

Also on this sub-tab is a list of all your Custom Reports. You can tailor a report to your specifications and run it whenever you need to.

The last thing on this sub-tab is a list of Recent Reports. You just need to click the report and Oasis will generate a new report reflecting any recent additions to the Oasis database.

Running a report is a simple process. Let's go over the steps.

For this example, we are going to run an Assistance report. This report will give you a record of all the assistance your Oasis network has provided during a time period that you specify. When you click the button for the Assistance report (shown above in the red box), the following window will open.



### Choose Filters for Assistance Report

☒ Include **Private** Assistance Format: ☒ List ☐ Table ☐ CSV

- ☐ Filter By **Date Of Assistance** (Skip To Include All)
- ☐ Filter By **Number Of Times Assisted** (Skip To Include All)
- ☐ Filter By **Household Yearly Income** (Skip To Include All)
- ☐ Filter By **Age** (Skip To Include All)
- ☐ Filter By **ROI Status** (Skip To Include All)
- ☐ Filter By **Household** (Skip To Include All)
- ☐ Filter By **Funding Source** (Skip To Include All)
- ☐ Filter By **Assistance Category** (Skip To Include All)
- ☐ Filter By **Demographic Profile Match** (Skip To Include All)
- ☐ Filter By **Zip Code** (Skip To Include All)
- ☐ Filter By **County** (Skip To Include All)

First, you need to select the format most appropriate for your needs. The List and Table formats will allow you to view the report prior to printing. The CSV format will take about 15 minutes, and when it is complete you will be notified by email. You can download your report and open it in a spreadsheet program like Excel.

Next, select the filters to customize your report. Click on each filter and check the appropriate box(es).

**Note:** If you do NOT modify a filter, the report will include all information represented by that filter.

Now click the Next button to go on to the final step.

### Choose Fields for Report

Order Assistance By  
Oldest to Newest

☐ Report Sections To Include

- ☒ Assistance Summary
- ☒ Assistance Record

☐ Assistance Summary Report Fields

- ☒ Summary: Assistance amount
- ☐ Summary: Assistance unit totals
- ☒ Summary: Assistance count
- ☒ Summary: Age ranges
- ☒ Summary: Case count
- ☐ Summary: New case count
- ☒ Summary: Household age ranges
- ☒ Summary: Household count
- ☐ Summary: New household count

☐ Assistance Record Report Fields

- ☒ Assistance: Category
- ☒ Assistance: Amount
- ☒ Assistance: Unit
- ☒ Assistance: Description
- ☒ Assistance: Funding source

Now you're ready to fine tune your report to include only the information you need.

First, when you click the down arrow for "Order Assistance By", you can order by Oldest to Newest, Newest to Oldest, Category Name, or Case Name.

Next, you simply check or uncheck the boxes beside each description to select the fields you need.

Once you have selected the information you need, click the View Report button. Oasis will open a page containing your report.



Total Assistance Report – Food Bank Demo

oasisinsight.net https://fbdemo.oasisinsight.net/reports/52/
Google

OasisInsight
Logged in as Bill Smith

Go Back
Print Report

## All Agencies

### Total Assistance Report (page 1 of 184)

#### Report Filters

Include private records: Yes  
Date range: Jan 01, 2011 to Dec 31, 2011

#### Report Summary

Total Assistance: **\$ 28137.50**  
Assistance Records: 18338

Children (0 - 14) in Assisted Households: 3459  
Adults (15 - 61) in Assisted Households: 2413  
Seniors (62+) in Assisted Households: 185  
Other (unknown) in Assisted Households: 2039  
**Total Households Assisted: 2180 households with a total of 8096 members**

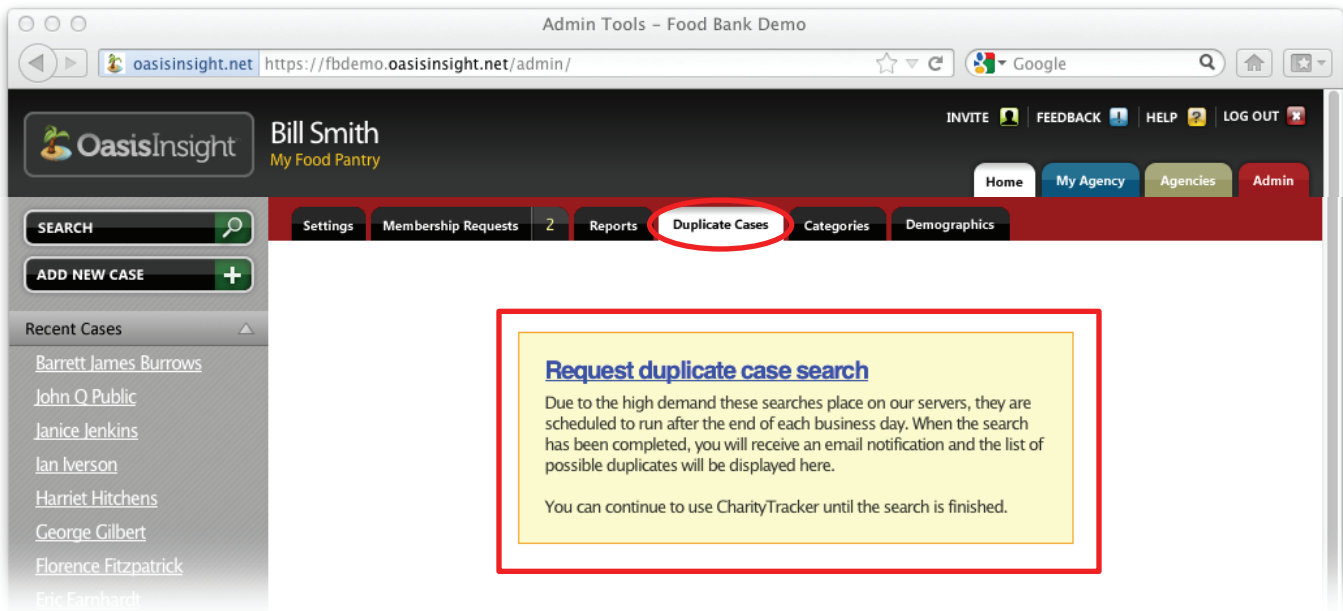
Case #	Last Name	First Name	SS Number	Assistance Date	Entry Agent	Assisting Agency	Category	Amount
C48842	Public	John		Mon, Jan 3, 2011	Bill Smith	My Food Pantry	School: Supplies	30.00 Item(s) (Est. \$ 0.00)
C48858	Jenkins	Janice		Mon, Jan 3, 2011	Bill Smith	My Food Pantry	School: Uniform	8.00 Item(s) (Est. \$ 60.00)
C48892	Iverson	Ian		Mon, Jan 3, 2011	Bill Smith	My Food Pantry	Household: Furniture	5.00 Item(s) (Est. \$ 0.00)

1-100 of 18338 Assistance Records
«Previous 1 2 3 ... 183 184 Next »

To print your report, you can click the Print Report button in the upper right corner of the screen.

### **Tips for Reporting:**

- Everything in the Choose Filters for Assistance Report window (pg. 25) will be included by default.
- We suggest you run a report and check all the boxes on the second screen (pg. 25). Take a look at what you have and work from there.
- When trying to get demographics, remember that when you select multiple demographics you are asking the system to show you individuals who have all those demographics you have selected.
- If you have questions about which report will be most appropriate for your needs, please click the Feedback button in the upper right corner of your Oasis and let us know how we can help.



Admin Tools – Food Bank Demo

oasisinsight.net https://fbdemo.oasisinsight.net/admin/

Bill Smith  
My Food Pantry

INVITE FEEDBACK HELP LOG OUT

Home My Agency Agencies Admin

Settings Membership Requests 2 Reports **Duplicate Cases** Categories Demographics

SEARCH

ADD NEW CASE

Recent Cases

- Barrett James Burrows
- John O Public
- Janice Jenkins
- Ian Iverson
- Harriet Hitchens
- George Gilbert
- Florence Fitzpatrick
- Eric Earnhardt

**Request duplicate case search**

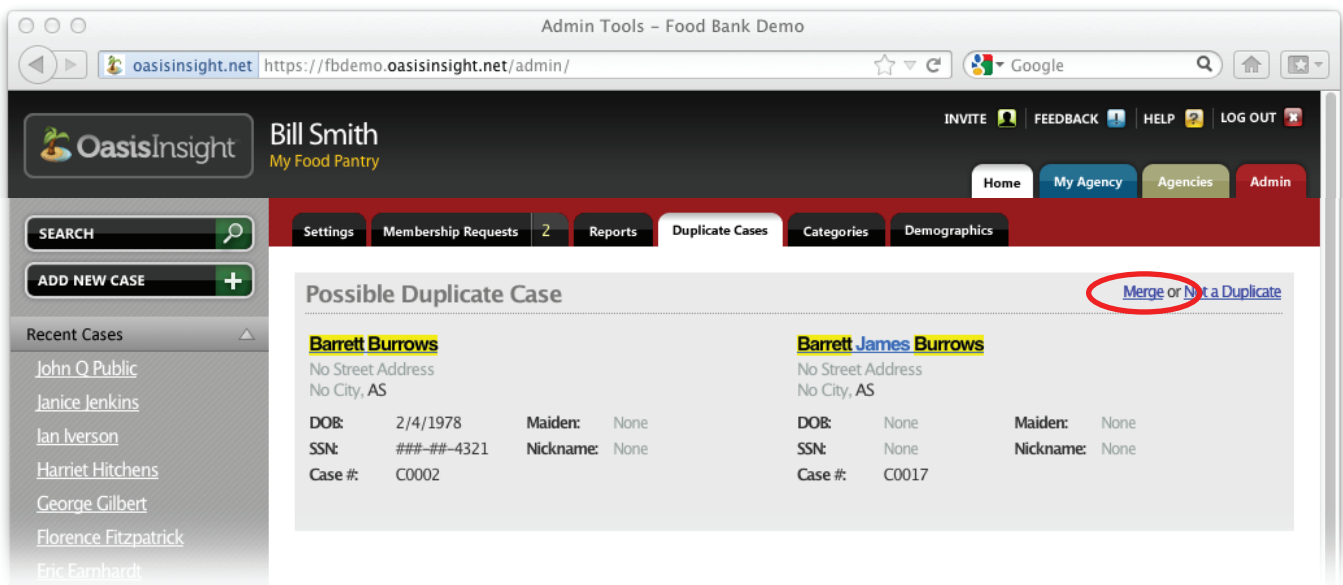
Due to the high demand these searches place on our servers, they are scheduled to run after the end of each business day. When the search has been completed, you will receive an email notification and the list of possible duplicates will be displayed here.

You can continue to use CharityTracker until the search is finished.

The Duplicate Cases sub-tab is for finding and merging duplicate records in your Oasis database. If agents in your network are not careful to search before entering a case, a client could be entered into your Oasis more than once.

To find the duplicate cases in your Oasis, you must request a duplicate case search (by clicking the link in the red box above). Oasis will search through your entire database looking for duplicates. Because such intensive searching puts a heavy load on the Oasis servers, the search will not be performed until after each workday. You will receive an email notifying you that the report is done, and when you return to this sub-tab a list of possible duplicates will be waiting for you.

In the list of possible duplicate cases, in each row, you will see two cases that Oasis thinks may be same client. You can choose to mark the cases "Not a Duplicate," or you can choose to merge the cases.



Admin Tools – Food Bank Demo

oasisinsight.net https://fbdemo.oasisinsight.net/admin/

Bill Smith  
My Food Pantry

INVITE FEEDBACK HELP LOG OUT

Home My Agency Agencies Admin

Settings Membership Requests 2 Reports **Duplicate Cases** Categories Demographics

SEARCH

ADD NEW CASE

Recent Cases

- John O Public
- Janice Jenkins
- Ian Iverson
- Harriet Hitchens
- George Gilbert
- Florence Fitzpatrick
- Eric Earnhardt

**Possible Duplicate Case**

Barrett Burrows		Barrett James Burrows	
No Street Address	No Street Address	No Street Address	No Street Address
No City, AS	No City, AS	No City, AS	No City, AS
DOB: 2/4/1978	Maiden: None	DOB: None	Maiden: None
SSN: ###-##-4321	Nickname: None	SSN: None	Nickname: None
Case #: C0002		Case #: C0017	

Merge or Not a Duplicate

### Merge Cases

**Choose** which fields you would like to keep from each case to be used in your newly created case.

This will combine case # C0017 with case # C0002. Case # C0017 will no longer exist after merging.

**Head of household**

☐ False  
☒ True

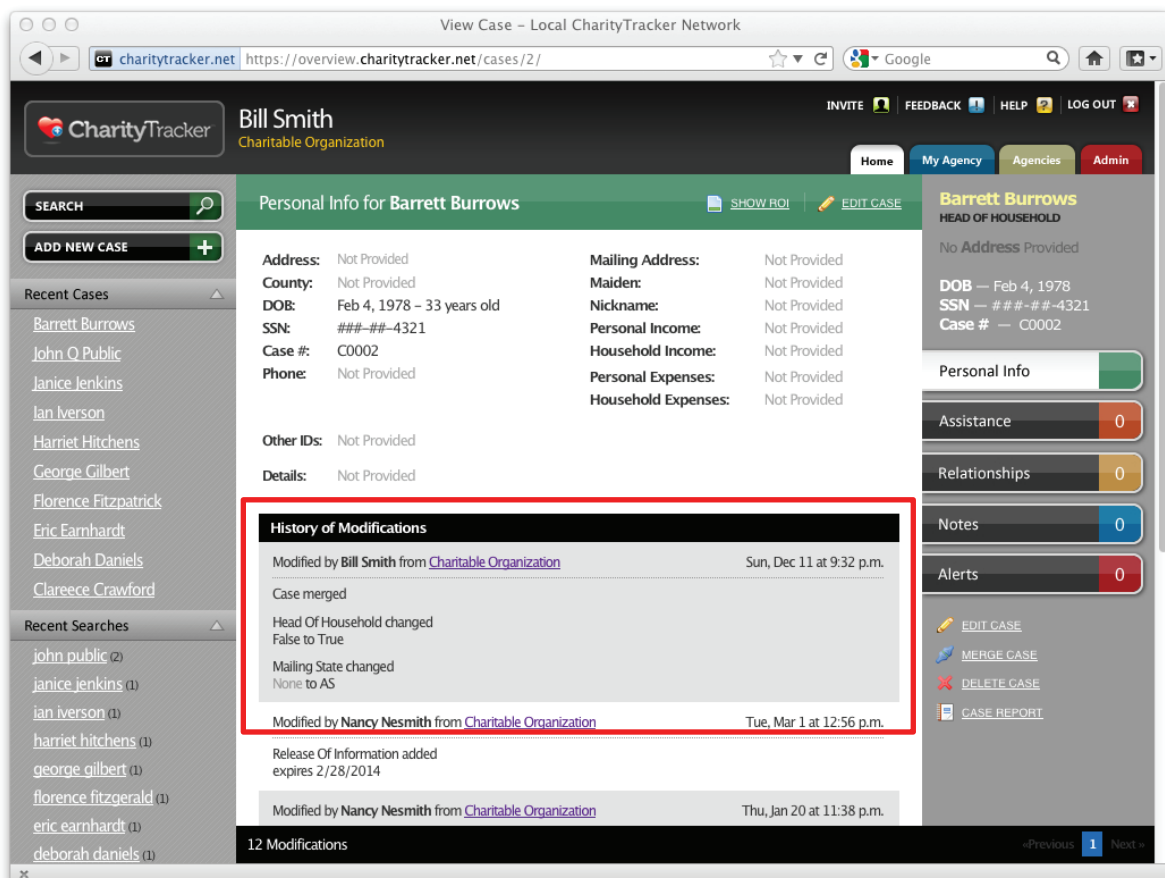
**Mailing Address: State**

☐ None  
☒ AS

[Merge Cases](#) [Cancel](#)

In the window that opens, you decide which piece of information you are going to keep for each field with a discrepancy.

When you click the Merge Cases button, the cases are merged. Oasis will take you to the case so you can review it. You will notice that the History of Modifications section (in the red box below) makes a note that the case has been merged, and keeps track of the information that changed during the merge.



View Case - Local CharityTracker Network

charitytracker.net https://overview.charitytracker.net/cases/2/

**CharityTracker** Bill Smith Charitable Organization

INVITE FEEDBACK HELP LOG OUT

Home My Agency Agencies Admin

SEARCH

ADD NEW CASE

Recent Cases

- Barrett Burrows
- John O Public
- Janice Jenkins
- Ian Iverson
- Harriet Hitchens
- George Gilbert
- Florence Fitzpatrick
- Eric Earnhardt
- Deborah Daniels
- Clareece Crawford

Recent Searches

- john public (2)
- janice jenkins (1)
- ian iverson (1)
- harriet hitchens (1)
- george gilbert (1)
- florence fitzgerald (1)
- eric earnhardt (1)
- deborah daniels (1)

**Personal Info for Barrett Burrows** SHOW ROI EDIT CASE

Address: Not Provided Mailing Address: Not Provided  
County: Not Provided Maiden: Not Provided  
DOB: Feb 4, 1978 - 33 years old Nickname: Not Provided  
SSN: ###-##-4321 Personal Income: Not Provided  
Case #: C0002 Household Income: Not Provided  
Phone: Not Provided Personal Expenses: Not Provided  
Household Expenses: Not Provided

Other IDs: Not Provided  
Details: Not Provided

**Barrett Burrows**  
HEAD OF HOUSEHOLD  
No Address Provided  
DOB - Feb 4, 1978  
SSN - ###-##-4321  
Case # - C0002

Personal Info 0  
Assistance 0  
Relationships 0  
Notes 0  
Alerts 0

EDIT CASE  
MERGE CASE  
DELETE CASE  
CASE REPORT

**History of Modifications**

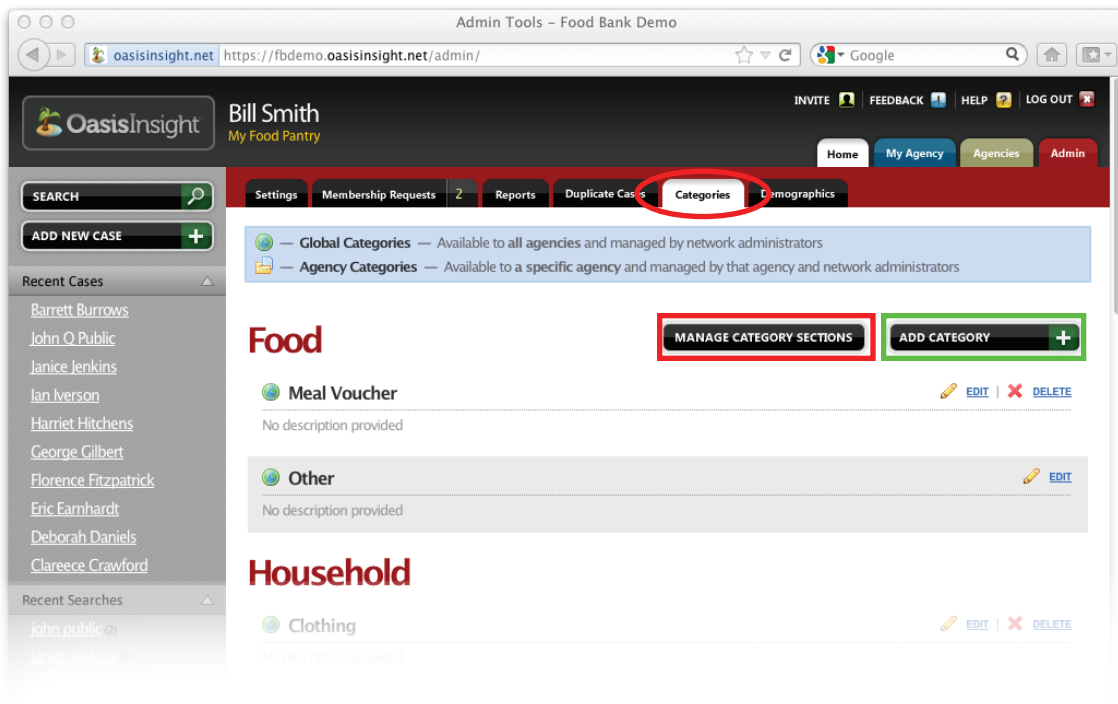
Modified by Bill Smith from Charitable Organization Sun, Dec 11 at 9:32 p.m.  
Case merged  
Head Of Household changed  
False to True  
Mailing State changed  
None to AS

Modified by Nancy Nesmith from Charitable Organization Tue, Mar 1 at 12:56 p.m.  
Release Of Information added  
expires 2/28/2014

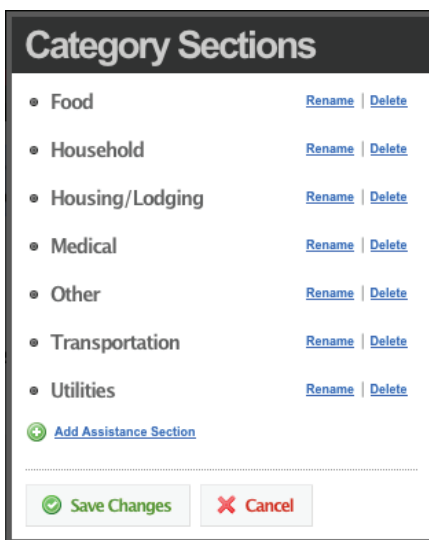
Modified by Nancy Nesmith from Charitable Organization Thu, Jan 20 at 11:38 p.m.

12 Modifications

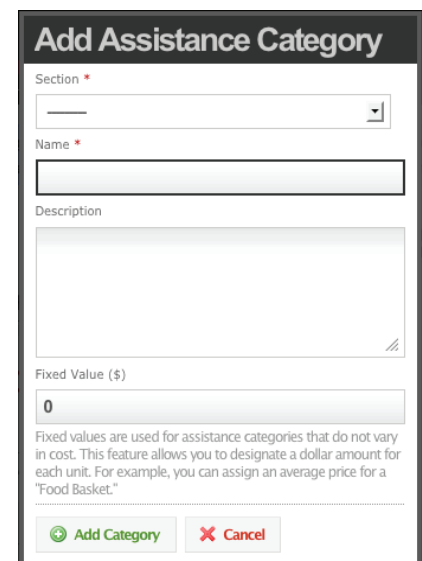
<Previous 1 Next >



The Categories sub-tab is where you define the categories for assistance records. You can see all Global and Agency categories. Global Categories are set by you, the network administrator. Agency Categories are set by each agency, and they can be managed by both the agency administrator and the network administrator.



Categories are separated into sections to help keep everything organized. You can add a new category by clicking the Manage Category Sections button (highlighted above with a red box). A window will open and you can add as many sections as you need.



Section \*

Name \*

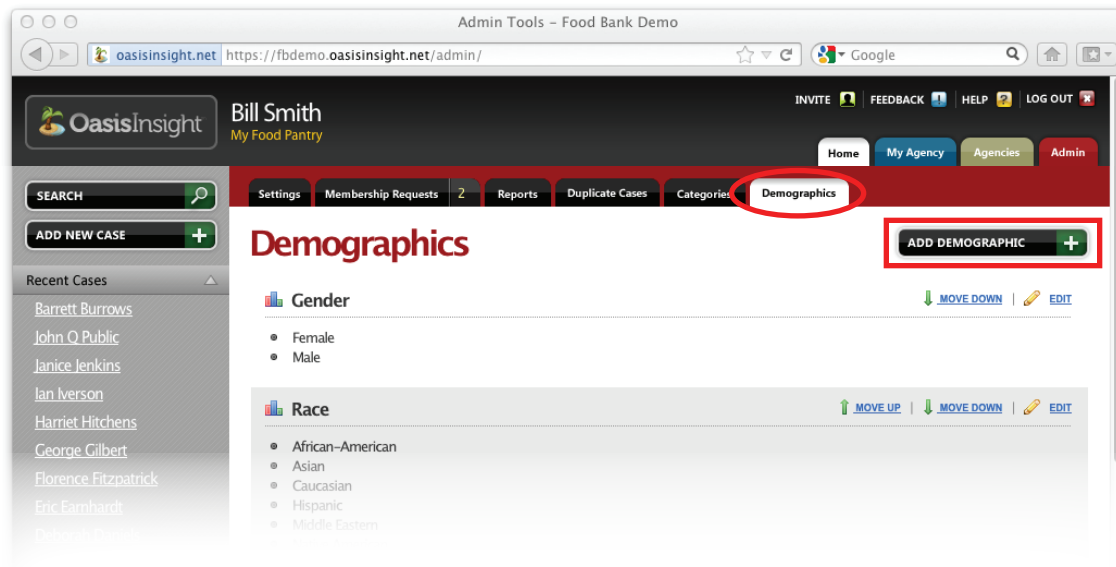
Description

Fixed Value (\$)

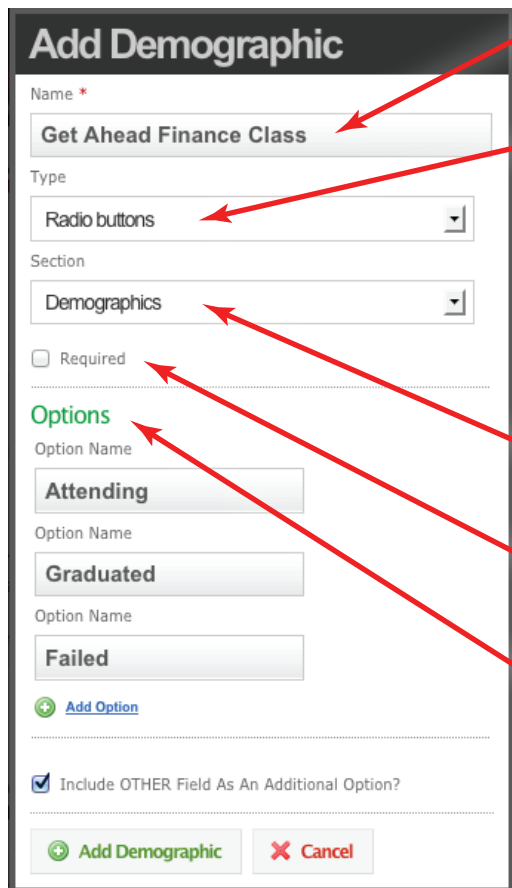
0

Fixed values are used for assistance categories that do not vary in cost. This feature allows you to designate a dollar amount for each unit. For example, you can assign an average price for a "Food Basket."

You can add new categories by clicking the Add Category button (highlighted in the top image, in a green box).



The Demographics sub-tab allows you to keep track of all sorts of information. In the following example, we'll create a demographic that keeps track of a client's involvement in a finance class. We'll start by clicking the Add Demographic button (highlighted with a red box).



In the window that opens, enter the name of your demographic.

Next, select how agents will choose from the options:

- Dropdown is a menu with a list of options from which agents will click to select.
- Checkboxes allow your agents the possibility of selecting multiple options.
- Radio buttons allow your agents to choose only one option.

You can also decide which section you want your demographic to be displayed in.

Checking the "Required" box makes a demographic mandatory.

"Options" is where you add all the options for your demographic.

Once you click the Add Demographic button, the demographic will be available to be recorded on all cases.

Thank you for taking the time to look through this user guide. If you have any questions please don't hesitate to contact us!

Email: [support@charitytracker.net](mailto:support@charitytracker.net)

Phone: 888.764.0633