

Service Insights: Frequently Asked Questions

Why is CTFB asking us to do this? What is the benefit to my agency?

Improving access to electronic client data has benefits for individual agencies and to the network as a whole. By taking a network-wide approach, CTFB will have the information we need to make more strategic decisions about the resources we provide and the services we are able to offer. For individual agencies, participating in Service Insights will allow you to better understand the people you serve, and demonstrate the true impact of your services. Service Insights can also speed up the intake and TEFAP certification process for clients and your staff, as well as help you track different programs such as your pantry assistance, HOPE, CSFP, or FFFF all within the same system.

What kinds of changes will my agency have to make?

Service Insights will look different for each agency, depending on the information they already collect and how it is stored. Service Insights is essentially about three things:

- Collecting a standard set of information during intake and storing it electronically
- Reporting data to CTFB, at least monthly
- Following data privacy and confidentiality measures, including a client consent process

Agencies that are already collecting electronic client data might need to make changes to the data points they collect. Your agency may be asked to collect new information from clients and/or change the way you report client data to CTFB. Agencies that are using paper forms can adopt an electronic system called Oasis Insight for collecting and managing client data. CTFB will work with your agency to outline what Service Insights looks like for your agency and how we can best provide support.

Is my agency required to participate?

Service Insights is part of our strategy to build capacity and increase the impact we have as a network, so it is important that we have all our partners participating over the next few years. CTFB will work individually with partners to understand current capacity, needs, and a feasible timeframe to onboard. Our network is diverse, and we know that some partners may face unique circumstances that prevent them from participating fully in this initiative. CTFB will provide exemptions for partners who demonstrate they meet certain criteria that prohibit them from conducting Service Insights activities.

My agency likes the system we use to manage our client data. Can we keep using it and still participate?

Yes! CTFB recognizes that our partners are using a variety of systems to collect and store client data, especially partners that are offering a range of services and programs to the community. If your system works well for your organization, CTFB will work with your agency to align the Core Client Data with the other programs your agency offers. You will need to report client data to CTFB on a monthly basis, and implement a Client Consent process.

What kind of information will CTFB be asking us to collect from clients?

All agencies that participate in Service Insights will need to make their best effort to collect the Core Client Data. In addition to information on the TEFAP/USDA application, this includes basic demographic information and questions about other people in the household and their needs. Some agencies may opt-in to collecting additional detailed information, but that is optional. Remember – clients may never be required to provide additional information after being certified, or to verify the information they choose to provide.

See [CTFB Supplemental Intake Form](#)

When will my agency have to make these changes?

Current Oasis Insight users will start seeing changes this fall. At that time, CTFB will also start to onboard partners who want to switch systems or adopt Oasis Insight. For agencies that are currently using paper forms, CTFB will work with them to start the onboarding process early next year.

How will these changes affect our intake process? Will this take longer?

It may take longer than normal the very first time you collect new information from clients, or the first time you conduct intake electronically. However, it will save you time in the long run because a client's information will already be stored in the system. When a client comes to a distribution, you can easily look them up and provide services accordingly, instead of looking them up on paper forms or checking for eligibility every time a client comes in.

Will we still be required to submit monthly reports to CTFB?

One benefit of adopting Oasis Insight is that you will no longer need to submit a monthly report to CTFB! During the training and onboarding process, your agency will still need to submit a monthly report for three months. After that, CTFB will be able to pull the report for you each month.

My agency does our client intake on paper. What does this mean for us?

CTFB can pay for your agency to adopt an electronic data management system called Oasis Insight. We will be able to provide training and hands-on support throughout the process. You can always reach out to your relationship manager with questions about what Service Insights means for you.

My agency is interested in collecting electronic client data, but we do not have the resources.

We can pay for the software license for your agency to adopt an electronic data management system called Oasis Insight. If your needs are mostly related to training and technical assistance, we can always provide those resources if your agency agrees to participate in Service Insights. If your agency needs resources like computers or other devices, CTFB will be sharing more information about how to apply for this kind of support later this year.

My agency is not interested in collecting client electronic data.

We know your time is valuable, and we would not be asking our network to make these changes if there wasn't a real benefit. Collecting electronic client data will allow your agency to better understand who clients are, where they are coming from, and their unique needs. It will also allow you to paint a picture of the services your agency offers and the populations you serve. This is valuable information that can be used to improve services, track clients over time, and inform reporting and grant writing. We know that this is a different way of doing things, but electronic client data tracking will benefit your agency and your clients in the long run. We will support your agency throughout the process.

If we decide to adopt Oasis Insight, can we import our existing data?

It depends. We typically recommend starting fresh in Oasis Insight. It can be time consuming to clean and merge existing data, and it can be expensive to import. The costs of importing historical data generally outweigh the benefits agencies might get from doing so. That said, there may be exceptions, and CTFB can work with your agency to identify these circumstances.

What if we used to collect client data electronically, but stopped during the COVID-19 pandemic?

If your agency was using Oasis Insight prior to the pandemic but has paused your use of the system during the last year, CTFB can help you re-onboard and make the same changes as active Oasis Insight users. If you were using a different system before COVID, CTFB can work with your agency to determine if adopting Oasis Insight is the right move for your agency. If you choose to keep your system, CTFB may ask you to align the client data you collect to our Core Data Elements, and to submit monthly data to us.

Why is CTFB making changes to the demographics fields in Oasis Insight?

There were a lot of duplicate fields throughout nearly all of our existing demographics. Standardizing fields in Oasis Insight will make it easier for agencies and CTFB to accurately track clients and generate reports, so that we understand the populations we serve as a network.

Will I lose the data or information I had already entered?

You will not lose any existing data or information about clients. CTFB will map the existing information in the system onto case records using the new fields.

What information about clients will be shared with other agencies?

Clients will have the option to share their information with your agency and CTFB only, or with other agencies in the network. For client data shared with the network, only the information needed for intake and eligibility will be visible to agencies that did not enter the client as their own. Assistance records will not be visible to other agencies. The primary reasons for data sharing are to improve the client experience by reducing intake times, prevent duplicate cases in the system, and streamline the intake and sign-in process at distributions. If your agency has questions about a specific client or case, you can always reach out to CTFB. As the network administrator, we can look into these questions and provide more detailed information on a case-by-case basis.

Do I need to use paper intake forms and sign in sheets if I switch to Oasis Insight?

We are pleased to offer the TEFAP application and certification in Oasis Insight and move towards a paperless option. This means that you will be able to have clients complete and sign the TEFAP / USDA application directly in the system. Ultimately, this will replace the need to save paper forms.