



# Service Insights

## Client Intake with Oasis Insight

### Step-by-Step Instructions and Guide

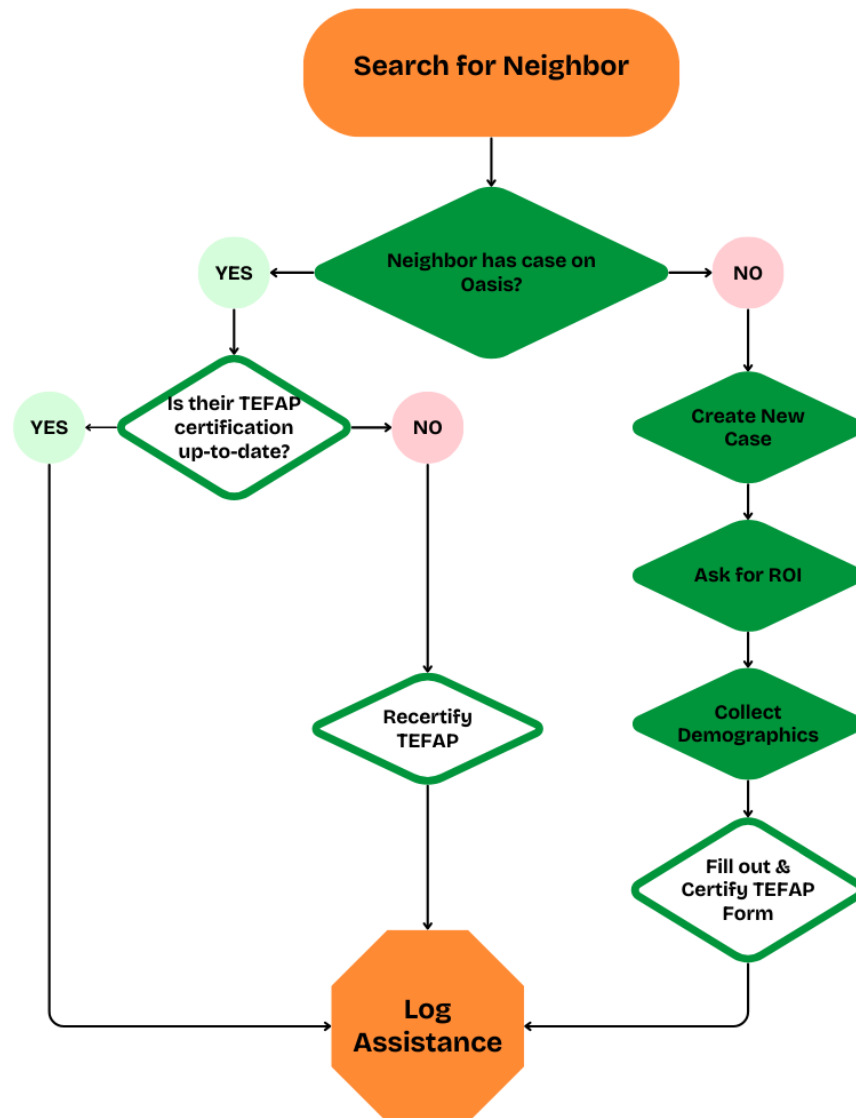
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## Log in to Oasis

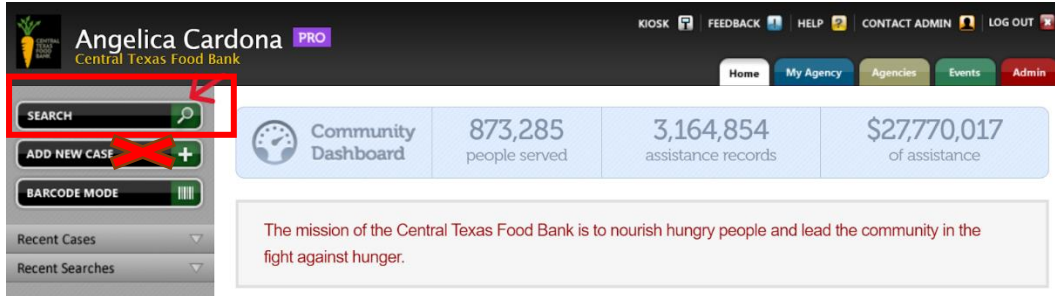
1. Log into Oasis with your account at <https://cafb.oasisinsight.net/>
  - a. If you need an account, reach out to your agency administrator who can create an account for you. If you don't have an administrator, please email [research@centraltexasfoodbank.org](mailto:research@centraltexasfoodbank.org).

## Overview of steps: Decision tree

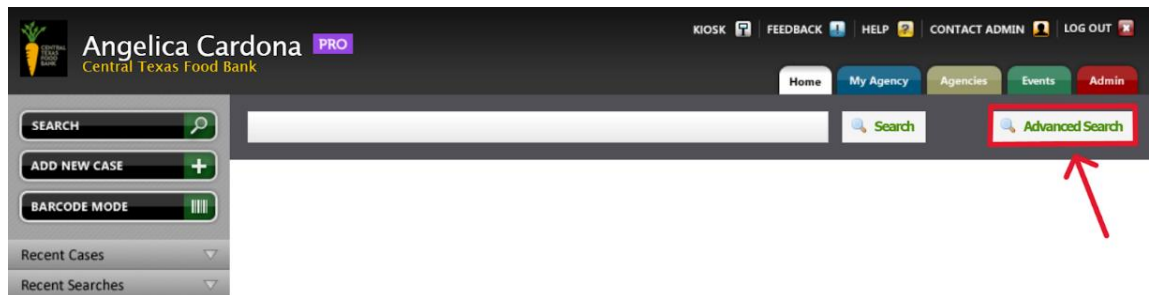


## Find or Add a Person

2. Always click **Search** to find a person, even if they are new to your pantry. They may have been added by another agency and adding a new case may create duplicates. (Do not click **Add New Case**).



3. Click **Advanced Search**. This is faster than basic search and only needs to be selected once.



4. Enter their **First and Last Name** and click **Search**.

This screenshot shows the 'Advanced Search' form. The 'First name' field contains 'Danny' and the 'Last name' field contains 'DeVito'. A red box highlights these two fields. Below them, the 'Search' button is also highlighted with a red box. The form includes fields for Address, City, State, Zip, Date of birth, Phone, and Other ID. A checkbox at the bottom right is labeled 'Only show HEAD OF HOUSEHOLD in search results.' Below the form, a message states 'No Results Found' and provides a link to 'Click here to create a case'.

5. **If no matches are found but you believe they are in the system**, try searching First Name and the full Date of Birth, Last Name and full Date of Birth, First Initial and Date of Birth, or Last Initial and Date of Birth. In Oasis, often times names are misspelled, and dates are entered incorrectly, so it may take a few attempts to find the right case. Additionally, it may be helpful to ask the neighbor if they could be listed under a different name, as many people have multiple last names which can be entered a few different ways (for example, a person name John Doe-Smith could be entered as John Smith, and they tell you their name is John Doe). If you can't find them after two or three searches, assume they are not in the system and create a new case.
  - a. **If no matches are found after using the searching methods listed above**, click on the ["Click here to create a case"](#) shown just below **"No Results Found"**. Clicking this link will bring all search information into the new Add Case page.
  - b. **NOTE:** If you click the **"Add New Case"** button to the left that will bring a blank form up and you will need to re-enter the information you already searched.
6. **If one or more names appear**, check that the **Date of Birth** matches. Select the existing record that matches.

**Advanced Search**

SEARCH [magnifying glass icon]    Back to Basic Search    Reset Search

ADD NEW CASE [plus icon]    BARCODE MODE [barcode icon]

Recent Cases    Recent Searches

First name: Test    Last name: Case    Case ID:    Date of birth (MM-DD-YYYY):    Address:    City:    State:    Zip:    Phone:    Other ID:    Email:    Search [magnifying glass icon]

☐ Only show HEAD OF HOUSEHOLD in search results.

<b>Test Case</b>	HEAD OF HOUSEHOLD — C169264
123 Hometown Rd Austin, TX 78203	DOB: Dec 25, 1945    Phone #: 512-251-9838    Email: No Email Provided Other IDs: Phone: 5122519838
<b>Test Case</b>	HEAD OF HOUSEHOLD — C867537
123 Address Austin, TX 78724	DOB: Jan 1, 1950    Phone #: 512-555-2736    Email: No Email Provided Other IDs: No Other IDs Provided
<b>Test Caseone</b>	HEAD OF HOUSEHOLD — C380309
6500 Metropolis Dr Austin, TX 78744	DOB: Feb 14, 1960    Phone #: 512-867-5309    Email: No Email Provided Other IDs: No Other IDs Provided

Don't see the case you're looking for? [Click here to create a case](#) from your search terms.

3 Cases    <Previous    1    Next >

- a. If multiple names are found with the same Date of Birth, go through the cases until you find one with a valid TEFAP record and use that one. If you don't find any with a valid TEFAP, you can use any of the listed cases as you'll collect all required TEFAP info for that neighbor.

## Add or Update Their Information

7. - For a **new case**, fill in all required information listed below.
- For an **existing case**, update information where it is blank or if you have more current information.
- If someone has a valid TEFAP already, fill in missing fields and log assistance.

### Identification Tab

8. Enter **First and Last Name, Date of Birth.**
9. **Release of Information (ROI)** – we recommend you to be familiar with the paragraph, but you can be more conversational when asking for ROI—as long as you bring all the important elements (why/benefits, who has and do not have access, and it is optional).
  - a. ROI allows other agencies in our network to find a neighbor on Oasis even if they have never been to their pantry before, speeding up the intake process if they go to a different pantry.
  - b. If you do not obtain an ROI from a neighbor, they will only be visible to your agency and duplicate cases will be created in Oasis every time they visit another pantry.
  - c. **ONLY PERSONAL INFORMATION** is visible to other agencies, **NOT** assistance!
  - d. And it is **NOT** shared with government of any other third party organizations.

10. **Street Address** will autocomplete as you enter it. If the address does not appear, enter it manually.
  - a. If someone is **unhoused** you can put “Unhoused” in the Address section. Or, enter the address for your pantry.
11. **Head of Household** is preselected and should be left checked.

All other fields on this tab are optional – only collect them if they are helpful to your organization.

**Add Case**

**Identification** | TEFAP - Eligibility & Income | Demographics | Extra Demographics | CSFP | CTFB On-Site Pantry

First Name \* Middle Name Last Name \* Suffix

Maiden Name Nickname

Date of Birth (MM-DD-YYYY)

☒ Head Of Household

**ROI Consent**

I Acknowledge My Information Will Be Stored In A Secure, Electronic Database And May Be Used By The Central Texas Food Bank (CTFB) And The Pantry Providing Services To Connect Me To Other Programs Or Services, Improve Services Provided To Me And My Community, Or Conduct Research. I Also Acknowledge That CTFB May Share Aggregated, Anonymized, Or De-Identified Information With Feeding America And Other Community Partners To Better Serve Me.

By Consenting To Release My Information, I Agree To Share My Information With CTFB And Its Partners To Improve Services For Me And Make It Easier To For Me To Access Food At Other Pantries In The CTFB Network Without Having To Provide The Same Information At Different Sites. By Not Consenting, I Agree To Only Share My Information With The Agency And CTFB.

☐ Client Agrees To Share Their Data With Central Texas Food Bank Partners.

☐ Client DOES NOT Agree To Share Their Data With Central Texas Food Bank Partners.

**Street Address** **Mailing Address**

Address Apt # Address Apt #

City State Zip City State Zip

Country TX TX

[COPY FROM STREET ADDRESS](#)

**Phone Numbers**

Description Number Ext.

(ex. Home or Cell)

[Add Phone Number](#)

**Identification Numbers**

Description Number

[Add Identification Number](#)

**Email Address**

Visible to All Agencies

[Add Case](#) [Cancel](#)

About the Visible to: bar

Visible to All Agencies ▼

**Please do NOT change this field manually! NEVER!!!**

This field is connected to the ROI. It automatically updates to “All Agencies” when the neighbor agrees to the ROI.

Once data is entered, click the arrow at the bottom right-hand corner or click the next *TEFAP -Eligibility and Income* tab at the top to continue entering information.

### TEFAP - Eligibility and Income Tab

12. Enter any **Other Assistance Received – TEFAP Eligibility** listed (e.g. Medicaid, NSLP, SNAP) **before asking about income.**
  - a. IMPORTANT: If they receive any of these government assistance programs you may skip the **Income Sources** and **Crisis Situation** questions.
13. If they do not have **Other Assistance Received – TEFAP Eligibility**, enter any **Income** and the time **Interval**
  - a. Put “Not Reported” for **Name** under **Income Sources**.
  - b. If no income, put a 0 in Amount.  
IMPORTANT: DO NOT LEAVE BLANK if a person has no income.  
*A blank means we have not asked and may be considered out of compliance.*
14. Skip **Expenses**.
15. If no government assistance or income listed (or they make above the limit for TEFAP eligibility), then ask what is causing them to need food.
  - a. **Was There A Crisis Situation That Caused You To Need Food?** Put “Yes”.
  - b. Under **If Yes, Please State The Situation** list the reason they provide (e.g. inflation, COVID, loss of job, medical bills...).
16. Enter **Household Size**.
17. **Proxy Name** (optional): Ask if they would like to put anyone down to pick up for them in the future. Put that name under **Proxy Name**. Two additional names can be listed under **Alternative Proxy Name**

**Add Case**

Identification
TEFAP - Eligibility & Income
Demographics
Extra Demographics
CSFP

**Income Sources**

Name <span style="border-bottom: 1px solid black; display: inline-block; width: 150px;"></span>	Phone <span style="border-bottom: 1px solid black; display: inline-block; width: 30px;"></span> - <span style="border-bottom: 1px solid black; display: inline-block; width: 30px;"></span> - <span style="border-bottom: 1px solid black; display: inline-block; width: 30px;"></span>	Amount <span style="border-bottom: 1px solid black; display: inline-block; width: 50px;"></span>	Interval <span style="border-bottom: 1px solid black; display: inline-block; width: 100px;"></span>
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+ Add Income Source

**Expenses**

Name <span style="border-bottom: 1px solid black; display: inline-block; width: 150px;"></span>	Phone <span style="border-bottom: 1px solid black; display: inline-block; width: 30px;"></span> - <span style="border-bottom: 1px solid black; display: inline-block; width: 30px;"></span> - <span style="border-bottom: 1px solid black; display: inline-block; width: 30px;"></span>	Amount <span style="border-bottom: 1px solid black; display: inline-block; width: 50px;"></span>	Interval <span style="border-bottom: 1px solid black; display: inline-block; width: 100px;"></span>
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+ Add Expense

**Other Assistance Received – TEFAP Eligibility**

☐ Medicaid  
☐ National School Lunch Program (NSLP) (Free Or Reduced-Price Meals)  
☐ Supplemental Nutrition Assistance Program (SNAP)  
☐ Supplemental Security Income (SSI)  
☐ Temporary Assistance For Needy Families (TANF)

**Household Size**

**Was There A Crisis Situation That Caused You To Need Food?**

**If Yes, Please State The Situation**

**Proxy Name (Person Allowed To Pick Up On Your Behalf)**

**Proxy Address**

**Proxy City**

**Proxy ZIP**

**Proxy Phone**

**Alternative Proxy Name 1 (If Applicable)**

**Alternative Proxy Name 2 (If Applicable)**

+ Add Case
✖ Cancel
▶▶

**1 (If Applicable)** and **Alternative Proxy Name 2 (If Applicable)**. Address is not required.

18. Once data is entered, click the arrow at the bottom right-hand corner or click the Demographics tab at the top to continue entering information.

## Demographics Tab

These Demographics questions are a big part of our Core Data and help the Central Texas Food Bank and you know who we are serving better, improve our services, and get better funding from grants and donors. We recommend asking all questions on the **Demographics** tab while letting neighbors know they are optional to answer.

19. Enter Government Benefits, Race/Ethnicity, Gender, Number of Children, Seniors, Veterans, Active-Duty Military, and College Students, and Language.
  - a. If someone says they receive none of the Government Benefits listed, please select **None**. A blank means you did not ask.
  - b. For numbers in household, please put 0 if none instead of leaving blank. A blank means that you did not ask.
20. Extra Demographics – Skip the Extra Demographics tab.

## Add Case

21. Now click “**Add Case**” or “Save Changes”.

The screenshot shows the 'Add Case' form with the 'Demographics' tab selected. The form is divided into several sections, each with a title and a list of options or input fields. The sections are: Government Benefits, Race/Ethnicity, Gender, Number Of Children (0-17) In Household, Number Of Seniors (60+) In Household, Number Of Veterans In Household, Number Of Active-Duty Military Members In Household, Number Of College Students In Household, Preferred Language, and a bottom section with 'Add Case' and 'Cancel' buttons. The 'Add Case' button is highlighted with a green circle.

**Add Case**

Identification TEFAP - Eligibility & Income **Demographics** Extra Demographics CSP

**Government Benefits**

- ☐ Social Security
- ☐ Texas Women's Health Program
- ☐ Veterans' Benefits
- ☐ WIC
- ☐ None
- ☐ Medicare
- ☐ CHIP
- ☐ Receives Food Stamps
- ☐ National School Lunch Program
- ☐ Other (Enter A Value Below)

**Race/Ethnicity**

- ☐ American Indian Or Alaska Native
- ☐ Asian
- ☐ Black Or African-American
- ☐ Hispanic, Latino/Latina, Or Spanish
- ☐ Middle Eastern Or North African
- ☐ Native Hawaiian Or Other Pacific Islander
- ☐ Some Other Race Or Ethnicity
- ☐ White
- ☐ Prefer Not To Answer

**Gender**

-----

**Number Of Children (0-17) In Household**

-----

**Number Of Seniors (60+) In Household**

-----

**Number Of Veterans In Household**

-----

**Number Of Active-Duty Military Members In Household**

-----

**Number Of College Students In Household**

-----

**Preferred Language**

-----

**Add Case** **Cancel**



## Create TEFAP Form

22. On the case created page on the right, click the TEFAP button. Create and certify the TEFAP form so the red banner at the top turns green.

The screenshot shows a web application interface for TEFAP certification. A prominent red banner at the top reads "ATTENTION: TEFAP CERTIFICATION IS DUE! Never Certified". Below this banner, a message states: "Only agents from Central Texas Food Bank can view this case and anything added." The main content area is titled "Personal Info for Test Neighbor" and contains a table of personal and financial information. To the right of this table is a sidebar with various tabs: "Personal Info", "Assistance", "Relationships", "Notes", "Documents", "Alerts", "Appointments", and "TEFAP". The "TEFAP" tab is highlighted with a red box and shows a count of 0. The sidebar also includes a "SHOW ON MAP" button and a "DOB" field.

Personal Info for Test Neighbor	
Address:	6500 Metropolis Dr Austin, TX 78744
County:	Travis
DOB:	Jan 1, 1950 – 73 years old
Case #:	C1018354
Email:	testemail@email.com
Phone:	512-555-1234 — Main
Mailing Address:	Not Provided
Maiden:	Not Provided
Nickname:	Not Provided
Income – Personal:	\$10,400 yr (\$866 mo)
Income – Household:	\$10,400 yr (\$866 mo – 41% poverty)
Expenses – Personal:	Not Provided
Expenses – Household:	Not Provided
Net Income – Personal:	\$10,400 yr (\$866 mo)
Net Income – Household:	\$10,400 yr (\$866 mo)
Total Living in Household:	3
Agency Last Assistance:	None
Network Last Assistance:	None
Other IDs:	Not Provided
Details:	Household Size: 3
Government Benefits:	Veterans' Benefits
Race/Ethnicity:	Some other race or ethnicity

TEFAP Forms for Test Neighbor

ADD FORM +

Show tefap forms for... ☒ Test Neighbor ☒ Living with ☐ Related

[Add your first TEFAP Form](#)

Within this tab you can create and view all TEFAP Forms for Test. In addition, you can view TEFAP Forms for anyone related to or living with Test.

23. Click “Add form”:

The screenshot shows a dialog box titled "Add your first TEFAP Form". It contains the following text: "Within this tab you can create and view all TEFAP Forms for Test. In addition, you can view TEFAP Forms for anyone related to or living with Test." The dialog box is yellow and has a red border.

24. All information is brought in from the “Add/Edit Case” popup and can be left alone, except for the two fields below.

25. **“Household is eligible based on the following \*”**

Select eligibility reason based on this order:

- a. Receives Government Assistance Listed Above
- b. Low Income
- c. Crisis Food Need

**Remember:** Eligibility based on “a” and “b” certifies for 12 months. Based on “c”, certifies only for 6 months! So ALWAYS ASK!

26. **“Agent Name \*”**

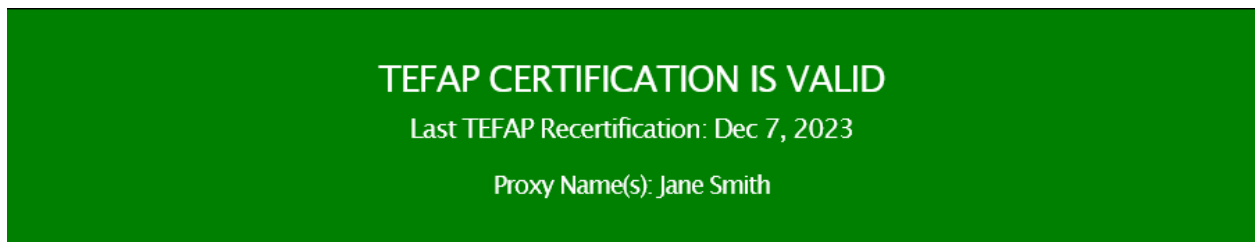
Enter your name as the person certifying this info.

27. *Edit Entry Date/Time* – ONLY if you are entering paper forms from another date! In this case, use this option to put the date the information was collected. If information is entered live or same day you can skip this. Ignore time of day.

28. Click “Save and Close”

The screenshot shows the 'TEFAP - TEFAP' form. At the top, there's a banner 'TEFAP'. Below it, a section titled 'Other Assistance Received - TEFAP Eligibility' contains several checkboxes: 'Supplemental Nutrition Assistance Program (SNAP)', 'Temporary Assistance for Needy Families (TANF)', 'National School Lunch Program (NSLP) (free or reduced-price meals)', 'Supplemental Security Income (SSI)', and 'Medicaid'. Below this is a dropdown menu for 'Was there a crisis situation that caused you to need food?' and a text field for 'If yes, please state the situation.' A red box highlights the dropdown menu labeled 'Household is eligible based on the following \*'. Below this is a text field for 'Proxy Name (person allowed to pick up on your behalf)' with 'Jane Smith' entered. Below that are fields for 'Proxy Address', 'Proxy City', and 'Proxy ZIP'. A red box highlights the 'Agent Name \*' field. Below that is a 'Notes' section. At the bottom, a red box highlights the 'Edit Entry Date /Time' link, which shows 'Dec 7, 2023 at 12:22 p.m.'. At the very bottom, there are two buttons: 'Save & Close' (highlighted with a red box) and 'Cancel'.

Once correctly entered, the banner at the top should turn green and show any Proxy names listed.



## Log Assistance

29. From the case page for this neighbor, click the Assistance tab at the right.

**TEFAP CERTIFICATION IS VALID**  
Last TEFAP Recertification: Feb 13, 2024  
Proxy Name(s): Jane Smith

Only agents from Central Texas Food Bank can view this case and anything added.

**Personal Info for Test Neighbor**

Address: 6500 Metropolis Dr Austin, TX 78744  
County: Travis  
DOB: Jan 1, 1950 - 74 years old  
Case #: C1018354  
Email: test@mail.com  
Phone: 512-555-1234 — Main

Mailing Address: Not Provided  
Maiden: Not Provided  
Nickname: Not Provided  
Income - Personal: \$10,400 yr (\$866 mo)  
Income - Household: \$10,400 yr (\$866 mo - 40% poverty)  
Expenses - Personal: Not Provided  
Expenses - Household: Not Provided  
Net Income - Personal: \$10,400 yr (\$866 mo)  
Net Income - Household: \$10,400 yr (\$866 mo)  
Total Living in Household: 3  
Agency Last Assistance: None  
Network Last Assistance: None

Other IDs: Not Provided  
Details: Household Size: 3  
Race/Ethnicity: Some other race or ethnicity  
Gender: Male  
ROI Consent: Client DOES NOT agree to share their data with Central Texas Food Bank partners.  
Government Benefits: Veterans' Benefits  
Number of Children (Under 18) in Household: 1  
Number of Active Duty Military Members in Household: 1

**Test Neighbor**  
HEAD OF HOUSEHOLD  
6500 Metropolis Dr Austin, TX 78744  
512-555-1234 (Main)  
DOB — Jan 1, 1950  
Case # — C1018354  
Household Size — 3  
Number of Children (Under 18) in Household — 1  
ROI Consent — Client DOES NOT agree to share their data with Central Texas Food Bank partners.

Personal Info  
Assistance 0  
Relationships 2  
Notes 0

30. Click “Add Assistance”

**TEFAP CERTIFICATION IS VALID**  
Last TEFAP Recertification: Dec 7, 2023  
Proxy Name(s): Jane Smith

Only agents from Central Texas Food Bank can view this case and anything added.

**Assistance for Test Neighbor**

Show all assistance for... ☒ Test Neighbor ☒ Living with ☐ Related

**ADD ASSISTANCE**

**Test Neighbor**  
HEAD OF HOUSEHOLD  
6500 Metropolis Dr Austin, TX 78744  
512-555-1234 (Main)  
DOB — Jan 1, 1950  
Case # — C1018354  
Household Size — 3

Personal Info  
Assistance 0

31. START by selecting the **Category** dropdown, scroll down and select the proper assistance category.

- a. **Provided By:** Your agency's name will automatically populate under "Provided By".

**You may need to reach out to your CTFB Program Administrator to determine the correct category that your organization should be using.**

Make sure the Category, Amount and Unit are correct (typically 1 Unit).

NOTE 1: Different locations: if you have multiple locations, make sure to select the Category for that given location. If it needs to be created your Agency Administrator can do so.

NOTE 2: Some pantries will have other assistance they provide like Diapers, HEB gift cards, etc. Make sure you select the correct category to represent the assistance you are providing. Again, reach out to your Agency Administrator if you need to create additional assistance categories.

NOTE 3: If entering data from a previous date, click "Edit Entry Date/Time" and enter the date assistance was provided. This is especially important to make sure your monthly reports are correct. Do not worry about the Time.

32. Click **"Add"** at bottom.

The table below provides the common categories for some programs:

Program	Oasis Category to log assistance
<b>Feeding Futures (School Pantries)</b>	Feeding Futures School Pantry - Pantry Assistance
<b>Partner Agencies (PAs)</b>	Food Pantry - Pantry assistance
<b>CTFB's Mobile Pantry</b>	Mobile Pantry - MP: <i>[As per location of distribution]</i>

## Editing a Case

If you need to fix or update any information, click the Edit Case link. If you can't see the Edit Case link, make sure you're on the Personal Info tab.

SEARCH

ADD NEW CASE

BARCODE MODE

Recent Cases

Recent Searches

**TEFAP CERTIFICATION IS VALID**  
Last TEFAP Recertification: Dec 7, 2023  
Proxy Name(s): Jane Smith

Only agents from Central Texas Food Bank can view this case and anything added.

**Personal Info for Test Neighbor**

Address: 6500 Metropolis Dr  
Austin, TX 78744

County: Travis

Mailing Address: Not Provided

Maiden: Not Provided

**Test Neighbor**  
HEAD OF HOUSEHOLD  
6500 Metropolis Dr  
Austin, TX 78744  
SHOW ON MAP  
512-555-1234 (Main)  
DOB — Jan 1, 1950  
Case # — C1018354  
Household Size — 3

**EDIT CASE**

**Personal Info**

Then the Edit Case popup will appear:

**Edit Case — Test Neighbor**

**Identification** | TEFAP - Eligibility & Income | Demographics | Extra Demographics

First Name \* Middle Name Last Name \* Suffix

Test Neighbor

Maiden Name Nickname

Date Of Birth (MM-DD-YYYY)

1 - 1 - 1950

☒ Head Of Household ☐ Deceased

**ROI Consent**

I Acknowledge My Information Will Be Stored In A Secure, Electronic Database And May Be Used By The Central Texas Food Bank (CTFB) And The Pantry Providing Services To Connect Me To Other Programs Or Services, Improve Services Provided To Me And My Community, Or Conduct Research. I Also Acknowledge That CTFB May Share Aggregated, Anonymized, Or De-Identified Information With Feeding America And Other Community Partners To Better Serve Me.

By Consenting To Release My Information, I Agree To Share My Information With CTFB And Its Partners To Improve Services For Me And Make It Easier To For Me To Access Food At Other Pantries In The CTFB Network Without Having To Provide The Same Information At Different Sites. By Not Consenting, I Agree To Only Share My Information With The Agency And CTFB.

☒ Client Agrees To Share Their Data With Central Texas Food Bank Partners.  
☐ Client DOES NOT Agree To Share Their Data With Central Texas Food Bank Partners.

## Removing Duplicates

### Flagging Cases Created by Other Agencies

If you are trying to merge cases where one of the cases was created by another agency, you will not be able to merge them. Instead, you can flag the case and one of our Database Managers or Volunteers will merge the cases.

<b>Address:</b> 123 N Lane Temple, TX 76504	<b>Mailing Address:</b> Not Provided	<div>Assistance 0</div> <div>Relationships 2</div> <div>Notes 0</div> <div>Documents 0</div> <div>Alerts 1</div> <div>Appointments 0</div> <div>CSFP 1</div> <div>TEFAP 1</div> <div>EDIT CASE</div> <div>FLAG CASE</div> <div>CASE REPORT</div> <div>ID CARD</div>
<b>County:</b> Bell	<b>Maiden:</b> Not Provided	
<b>DOB:</b> May 17, 1950 – 73 years old	<b>Nickname:</b> Not Provided	
<b>Case #:</b> C893831	<b>Income – Personal:</b> \$29,200 yr (\$2,433 mo)	
<b>Phone:</b> 254-555-5555 — Cell	<b>Income – Household:</b> \$29,200 yr (\$2,433 mo – 117% poverty)	
	<b>Expenses – Personal:</b> Not Provided	
	<b>Expenses – Household:</b> Not Provided	
	<b>Net Income – Personal:</b> \$29,200 yr (\$2,433 mo)	
	<b>Net Income – Household:</b> \$29,200 yr (\$2,433 mo)	
	<b>Total Living in Household:</b> 3	
<b>Other IDs:</b> Not Provided	<b>Agency Last Assistance:</b> None	
<b>Details:</b> <b>Household Size:</b> 3	<b>ROI Consent:</b> Client agrees to share their data with Central Texas Food Bank partners.	<b>Government Benefits:</b> Social Security
<b>Race/Ethnicity:</b> White	<b>Gender:</b> Female	<b>Number of Children (Under 18) in Household:</b> 1

1. To flag a case, go to the bottom right of a Case Page and click “Flag Case”.
2. In the Message section, write that this case needs to be merged and click “Flag Case”. This will alert our case mergers to handle these cases. Please include the Case ID number of the duplicate case, which case should be kept, and which information to use if there are discrepancies. If there are multiple cases that need merging, please mention that as well (although you do not have to list all case ID numbers).



By default, we keep the entered information like Address and Income from the case that most recently received assistance.

### Flag Case

Flagging a case allows you to send the network administrator(s) a private message regarding this case.

Message

Please merge with Case 0000000 and use this case's info as it is most up to date.





## Merging Cases Created by Your Agency

Agency Administrators will be able to merge cases created by your agency in Oasis.

- When you see that a duplicate exists, if both cases were created by your agency you will have the "Merge Case" option. Click that and put the Name or Case ID of the other case.


### Personal Info for Test Neighbor


 [EDIT CASE](#)


512-555-1234 (Main)


DOB — Jan 1, 1950  
Case # — C1018354  
Household Size — 3


- Personal Info
- Assistance 0
- Relationships 2
- Notes 0
- Documents 0
- Alerts 0
- Appointments 0
- TEFAP 1

 [EDIT CASE](#)

 [MERGE CASE](#)

 [DELETE CASE](#)

 [CASE REPORT](#)

 [ID CARD](#)

<b>Address:</b>	6500 Metropolis Dr Austin, TX 78744	<b>Mailing Address:</b>	Not Provided
<b>County:</b>	Travis	<b>Maiden:</b>	Not Provided
<b>DOB:</b>	Jan 1, 1950 – 73 years old	<b>Nickname:</b>	Not Provided
<b>Case #:</b>	C1018354	<b>Income – Personal:</b>	\$10,400 yr (\$866 mo)
<b>Email:</b>	testemail@email.com	<b>Income – Household:</b>	\$10,400 yr (\$866 mo – 41% poverty)
<b>Phone:</b>	512-555-1234 — Main	<b>Expenses – Personal:</b>	Not Provided
		<b>Expenses – Household:</b>	Not Provided
		<b>Net Income – Personal:</b>	\$10,400 yr (\$866 mo)
		<b>Net Income – Household:</b>	\$10,400 yr (\$866 mo)
		<b>Total Living in Household:</b>	3
		<b>Agency Last Assistance:</b>	None
		<b>Network Last Assistance:</b>	None

**Other IDs:** Not Provided

**Details:** Household Size: 3  
Gender: Male

**Government Benefits:** Veterans' Benefits  
**Number of Children (0–17) in Household:** 1

**Race/Ethnicity:** Some other race or ethnicity  
**Number of Seniors (60+) in Household:** 1

2. Select the case you would like to merge.

### Merge Case

Enter the name or case # of the case to merge with **Test Neighbor**

### Merge Case

<b>Test Neighbor</b>	HEAD OF HOUSEHOLD — C881676	
1123 Happy Home Rd #24 Austin, TX 78724	Main: 512-555-2736	DOB: Jan 1, 1950



3. Select the fields from the case you would like to keep and click Merge Cases. If the wrong case is initially chosen to be saved after the merge, click the “[I want to keep Case # C000000 instead](#)” link and the merge page will default to keeping that case’s information.

**Merge Cases**

**Choose** which fields you would like to keep from each case in your merged case.

This will combine case # **C881676** with case # **C1018354**.  
Case # **C881676** will no longer exist after merging.  
[I want to keep Case # C881676 instead.](#)

**Email**

☒ testemail@email.com  
☐ fakeemail@address.com

**Street Address: Street**

☒ 6500 Metropolis Dr  
☐ 1123 Happy Home Rd

**Alternative Proxy Name 2 (if applicable)**

☒ Other: ☐ Other: Test Grandpa

Case # C1018354 is only visible to Central Texas Food Bank

Make merged case visible to

Everybody

You'll then be brought to the new merged case page.

Note: The Merged Case ID will no longer be searchable but an ID card with the old ID will still be able to be scanned by a barcode scanner.