TEFAP Certification through Oasis Insight

There are two workflows for using Oasis Insight to complete electronic TEFAP Certification.

1. **Paper Intake and Manual Entry into Oasis**
   - Collect data using the USDA TEFAP Form and CTFB Core Supplemental Intake Paper Form
   - Certify the client as you always have using the USDA TEFAP Form
   - After the distribution, manually enter the data into the client's case demographic fields
   - Open the TEFAP Module
   - Change the entry date of the TEFAP form to match the date on the paper application (Note: It is extremely important for compliance reasons that the certification date in Oasis matches the date on the paper application)
   - Signatures:
     - Through December 31, 2021, write an "X" in the digital signature. No need to store paper copy as Oasis now has all the information needed.
       - After January 1, 2022, write "see upload" in the digital signature. Scan a hard copy of the paper application and upload it to the Documents tab
       - If you are unable to scan and upload files, Central Texas Food Bank will work with you to do so. In the meantime, write "see paper file" in the signature field and make sure the paper form is accessible upon request

2. **Electronic Intake**
   - Add a new case or search for an existing client and complete identification, eligibility & income, and demographics tabs
   - Open the TEFAP Module and create a TEFAP form
     - Through December 31, 2021: complete the digital signature by putting an "x" in the signature box.
     - Beginning January 1, 2022: have the client sign the TEFAP form using a mouse, a signature pad, or their finger if using a tablet.

Important Notes to Remember:
- Agencies have a choice to recertify everyone in Oasis Insight moving forward, or back-entering old TEFAP forms. CTFB recommends recertifying people moving forward to save time.
- If storing a paper copy, TEFAP forms need to be kept for 3 years.
- Client signatures are waived through December 31, 2021. During this time, there is no need to upload or store original paper copies if TEFAP certification is documented in Oasis Insight.
- As you start using the TEFAP module, we will phase out the USDA expiration date field and alert

Advantages of Certifying Someone Electronically:
- No need to store paper copies!
- TEFAP Banner will turn red to alert you when it is time to re-certify the client. Certification follows the client across pantries