Pulling Oasis Monthly Reporting Numbers

There are two ways a Partner Agency can pull their monthly reporting numbers in Oasis. The instructions below cover how to pull an Assistance Report (pg. 2) and a Service Insights Report (pg. 7). You can use either report to get the information needed to submit your monthly report.

For Oasis users you are asked to report the Total Households, Unique Households, Total Individuals, and Unique Individuals served. Here is a reminder of what this means:

- **Total Households Served**: This is the total number of households who received food in the month. This number is a duplicated number – each family should be counted every time they receive food from the pantry.
- **Total Individuals Served**: This is the total number of people who will benefit from the food received from the pantry during the month. This is also a duplicate number.
- **Unique (Unduplicated) Households Served**: This is the number of unduplicated households that receive food in the month. This means that you count the household one visit per month, even if they visit more than one.
- **Unique (Unduplicated) Individuals Served**: This is the total number of people who have benefited from the food received from the pantry during the month. This is an unduplicated number.

We hope this document is helpful to your agency. If you have any reporting questions, please email research@centraltexasfoodbank.org and/or call the Agency Hotline at: 512-463-0708.
How to Pull an Assistance Report:
Use these instructions to pull monthly reporting numbers, including Duplicated Households and Duplicated Individuals, to send to the Central Texas Food Bank.

What Assistance Categories to Use
All agencies have been trained to log assistance when a neighbor receives food assistance at your pantry. Due to the type of assistance a pantry may provide, there are many Assistance Categories in Oasis that you can use to track the different kinds of assistance you provide.

CTFB Recommendation: For monthly reporting of food pantry assistance to the Central Texas Food Bank, we recommend using the “Food Pantry: Pantry Assistance” category, although we will be looking at all categories in the “Food Pantry” section.

Note: If you are giving out food for a specific program, i.e. Fresh Foods, CSFP, HOPE, please use those categories instead. Similarly, if you give out clothing or diapers and track that in Oasis, please do not use the “Pantry Assistance” category for that.
Running a Monthly Assistance Report

To start, go to the My Agency tab, click on the Reports sub-tab, and click the Assistance report type.

On the Assistance Report popup, select the filters you need.

- For reporting purposes, you will want to filter on the **Date of Assistance** as shown below.
- If necessary, remember to filter for the type of **assistance category** if you are logging or providing assistance beyond food. Please be sure to include all food assistance categories you are logging in Oasis (Excluding special program categories such as HOPE, CSFP, FFFF).
- **Note:** If you don’t select any assistance categories it will show all assistance categories.
Scroll down and click **Next**
On the “Choose Fields to Report” page, select “Summary: Duplicated count” in the “Assistance Summary Report Fields”, everything else can remain as is.

Scroll down and click “View Report”
After the report loads, in the **Report Summary Section** at the top, find “**Total Households Assisted**” and “**Duplicated Households Assisted**”. The numbers you will report to CTFB are both found here: the number of households (unique and total) and the total members also known as individuals (unique and total).

**Report Summary**

- **Total Assistance:** $0.00
- **Assistance Records:** 2

Children (0 - 17) Assisted: 0  
Adult (18 - 64) Assisted: 0  
Senior (65+) Assisted: 1  
Other (unknown) Assisted: 0  
**Total Cases Assisted:** 1

Children (0 - 17) in Assisted Households: 0  
Adult (18 - 64) in Assisted Households: 0  
Senior (65+) in Assisted Households: 1  
Other (unknown) in Assisted Households: 0  
**Total Households Assisted:** 1  
**Duplicated Households Assisted:**

1 household with a total of 5 members  
2 households with a total of 10 members

In this report, you would submit:

1. **Unique Households:** 1  
2. **Unique/De-duplicated Individuals:** 5  
3. **Total Households Served:** 2  
4. **Total/Duplicated Individuals Served:** 10
Alternate Monthly Report in Oasis (with Excel) – Service Insights Report

If you have access to Excel you can run the Service Insights Report to get these numbers as well. The benefit of the Service Insights Report is its clarity and additional demographic information.

To start, go to the My Agency tab, click on the Reports sub-tab, and click the Service Insights Report.

On the Service Insights Report popup, select the filters you need.

- For reporting purposes, you will want to filter on the Date of Assistance as shown below.
  
  If necessary, remember to filter for the type of Assistance Category if you are logging or providing assistance beyond food. Please be sure to include all food assistance categories you are logging in Oasis (Excluding special program categories such as HOPE, CSFP, FFFF).

- Note: If you don’t select any assistance categories it will show all assistance categories.
Scroll down and click **Next**

Click **Request Report** on the next popup window

**Note:** Oasis will show a message that you will receive an email. Check your email to see the report (this may take a few minutes or longer depending on how large the report is).
Once you receive the email click on the link to download your report. Log in if you haven’t already.

Click the link that says “Right-click here” to download it, or right-click and choose “Save Link As...”. Either way will download the CSV file.

Open the CSV file in Excel or Google Sheets ([here are instructions on how to import a CSV file to Google Sheets](#)).

<table>
<thead>
<tr>
<th>Central Texas Food Bank</th>
<th>Date Range:</th>
<th>07/01/2022 - 07/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Households</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total Households</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Unique Individuals</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Total Individuals</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>New Unique Households</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>New Unique Individuals</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

In the first section, find the fields **Unique Households, Total Households, Unique Individuals** and **Total Individuals**. From this report, you would submit:

Unique Households: 1
Unique Individuals: 5
Total Households Served: 2
Total Individuals Served: 10