Pulling a Report in Oasis Insight
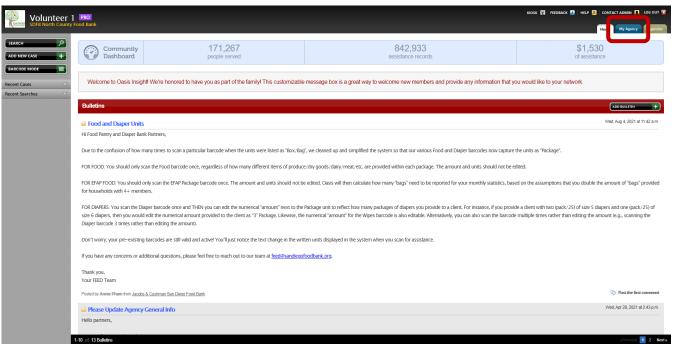
Agency Account
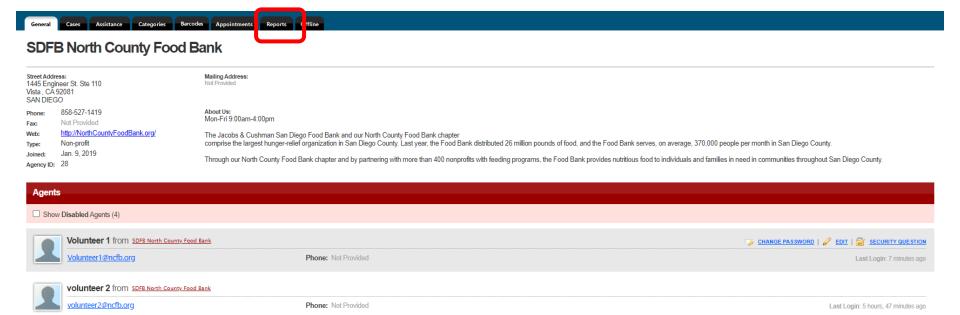
1) Go to the blue **My Agency** Tab which is the home screen for your Agency

Reports Tab

2) Click on the black Reports tab in the top blue bar

| General | Cases | Assistance | Categories | Barcodes | Appointments | **Reports** | Offline |

SDFB North County Food Bank

Street Address:
1445 Engineer St. Ste 110
Vista , CA 92081
SAN DIEGO

Mailing Address:
Not Provided

Phone: 858-527-1419
Fax: Not Provided
Web: http://NorthCountyFoodBank.org/
Type: Non-profit
Joined: Jan. 9, 2019
Agency ID: 28

About Us:
Mon-Fri 9:00am-4:00pm

The Jacobs & Cushman San Diego Food Bank and our North County Food Bank chapter
comprise the largest hunger-relief organization in San Diego County. Last year, the Food Bank distributed 26 million pounds of food, and the Food Bank serves, on average, 370,000 people per month in San Diego County.

Through our North County Food Bank chapter and by partnering with more than 400 nonprofits with feeding programs, the Food Bank provides nutritious food to individuals and families in need in communities throughout San Diego County.

Agents

☐ Show **Disabled** Agents (4)

Volunteer 1 from <u>SDFB North County Food Bank</u>   CHANGE PASSWORD   EDIT   SECURITY QUESTION
Volunteer1@ncfb.org   **Phone:** Not Provided
                                                            Last Login: 7 minutes ago

volunteer 2 from <u>SDFB North County Food Bank</u>
volunteer2@ncfb.org   **Phone:** Not Provided
                                                            Last Login: 5 hours, 47 minutes ago

SAVED REPORTS

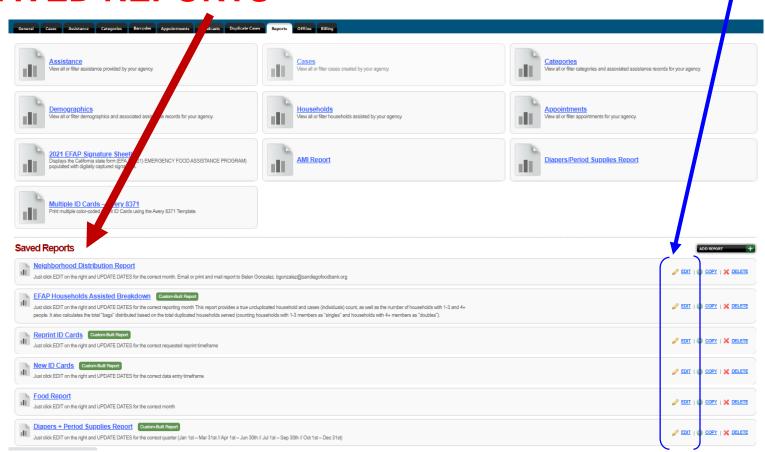**3) Find the report you want to pull and click EDIT.**

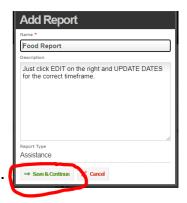Saved reports are the templates pre built for all of your reporting needs.

*Note: If you click on the title of the report without editing the dates first, it will pull the last report with old dates and wrong information.
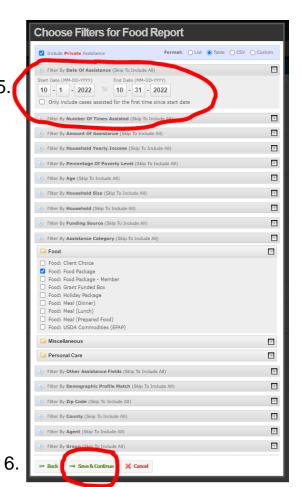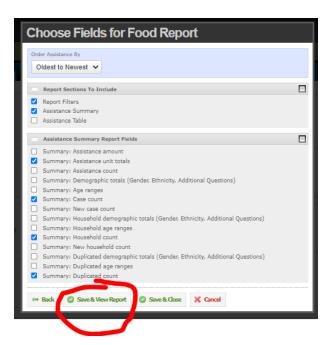

San Diego Food Bank

General | Cases | Assistance | Categories | Barcodes | Appointments | ...dcasts | Duplicate Cases | **Reports** | Offline | Billing

Assistance
View all or filter assistance provided by your agency.

Cases
View all or filter cases created by your agency.

Categories
View all or filter categories and associated assistance records for your agency.

Demographics
View all or filter demographics and associated assis...ce records for your agency.

Households
View all or filter households assisted by your agency.

Appointments
View all or filter appointments for your agency.

2021 EFAP Signature Sheet
Displays the California state form (EFA...21) EMERGENCY FOOD ASSISTANCE PROGRAM) populated with digitally captured signa...

AMI Report

Diapers/Period Supplies Report

Multiple ID Cards – Avery 8371
Print multiple color-coded...t ID Cards using the Avery 8371 Template.

Saved Reports

ADD REPORT +

Neighborhood Distribution Report
Just click EDIT on the right and UPDATE DATES for the correct month. Email or print and mail report to Belen Gonzalez. bgonzalez@sandiegofoodbank.org
EDIT | COPY | DELETE

EFAP Households Assisted Breakdown *Custom-Built Report*
Just click EDIT on the right and UPDATE DATES for the correct reporting month This report provides a true unduplicated household and cases (individuals) count, as well as the number of households with 1-3 and 4+ people. It also calculates the total "bags" distributed based on the total duplicated households served (counting households with 1-3 members as "singles" and households with 4+ members as "doubles").
EDIT | COPY | DELETE

Reprint ID Cards *Custom-Built Report*
Just click EDIT on the right and UPDATE DATES for the correct requested reprint timeframe
EDIT | COPY | DELETE

New ID Cards *Custom-Built Report*
Just click EDIT on the right and UPDATE DATES for the correct data entry timeframe
EDIT | COPY | DELETE

Food Report
Just click EDIT on the right and UPDATE DATES for the correct month
EDIT | COPY | DELETE

Diapers + Period Supplies Report *Custom-Built Report*
Just click EDIT on the right and UPDATE DATES for the correct quarter (Jan 1st – Mar 31st // Apr 1st – Jun 30th // Jul 1st – Sep 30th // Oct 1st – Dec 31st)
EDIT | COPY | DELETE

Regardless of what report you want to view, the steps remain the same.

4) Click Save and Continue
5) Change dates
- **Do not change any other filters on these pages.**
6) Save and Continue
7) Save and View Report

Choose Filters for Food Report

☑ Include **Private** Assistance   Format: ○ List ● Table ○ CSV ○ Custom

Filter By **Date Of Assistance** (Skip To Include All)
Start Date (MM-DD-YYYY)   End Date (MM-DD-YYYY)
10 - 1 - 2022   to   10 - 31 - 2022
☐ Only include cases assisted for the first time since start date

5.

Filter By **Number Of Times Assisted** (Skip To Include All)
Filter By **Amount Of Assistance** (Skip To Include All)
Filter By **Household Yearly Income** (Skip To Include All)
Filter By **Percentage Of Poverty Level** (Skip To Include All)
Filter By **Age** (Skip To Include All)
Filter By **Household Size** (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)

Food
☐ Food: Client Choice
☑ Food: Food Package
☐ Food: Food Package - Member
☐ Food: Grant Funded Box
☐ Food: Holiday Package
☐ Food: Meal (Dinner)
☐ Food: Meal (Lunch)
☐ Food: Meal (Prepared Food)
☐ Food: USDA Commodities (EFAP)

Miscellaneous
Personal Care

Filter By **Other Assistance Fields** (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)
Filter By **Agent** (Skip To Include All)
Filter By **Group** (Skip To Include All)

6.   ⇐ Back   ⇒ Save & Continue   ✖ Cancel

Add Report
Name *
Food Report
Description
Just click EDIT on the right and UPDATE DATES for the correct timeframe.
Report Type
Assistance

4.   ⇒ Save & Continue   ✖ Cancel

Choose Fields for Food Report

Order Assistance By
Oldest to Newest

Report Sections To Include
☑ Report Filters
☑ Assistance Summary
☐ Assistance Table

Assistance Summary Report Fields
☐ Summary: Assistance amount
☑ Summary: Assistance unit totals
☐ Summary: Assistance count
☐ Summary: Demographic totals (Gender, Ethnicity, Additional Questions)
☐ Summary: Age ranges
☑ Summary: Case count
☐ Summary: New case count
☐ Summary: Household demographic totals (Gender, Ethnicity, Additional Questions)
☐ Summary: Household age ranges
☑ Summary: Household count
☐ Summary: New household count
☐ Summary: Duplicated demographic totals (Gender, Ethnicity, Additional Questions)
☐ Summary: Duplicated age ranges
☑ Summary: Duplicated count

⇐ Back   ☑ Save & View Report   ☑ Save & Close   ✖ Cancel

7.

Reporting Quick Steps

1. Go to the blue **My Agency** Tab which is the home screen for your Agency
2. Click on the black Reports tab in the top blue bar
3. Find the report you want to pull and click EDIT.
4. Click Save and Continue
5. Change dates (Don't change anything else)
6. Save and Continue
7. Save and View Report

Food Report for our Food to Nonprofit Partners

You will take these numbers and report them in PWW. Questions about reporting in PWW should be directed to Rachel Dunkin rdunkin@sandiegofoodbank.org

Monthly Food Report

Report Filters

Include private records:	Yes
Date range:	Sep 01, 2021 to Sep 30, 2021
Category:	Food: Food Package

Report Summary

Assistance Unit Totals:	
Package:	466
Assistance Records:	466
Total Cases Assisted:	**140**
Total Households Assisted:	**140 households with a total of 546 members**
New households Assisted:	25 households with a total of 95 members
Duplicated Households Assisted:	**466 households with a total of 1743 members**

EFAP Household Assisted Breakdown Report

Household Breakdown EFAP

Report Filters

Include private records:	Yes
Date range:	Aug 01, 2022 to Aug 30, 2022
Households included:	assisted during date range
Category:	Food: USDA Commodities (EFAP)

Total Number of Households Served (SDFB report = HH):	Total Number of Cases Served (SDFB report = IND):	Total Number of Households with 1-3 Household Members:	Total Number of Households with 4 or more Household Members:
9	27	5	4

Total Number of Assistance:	Duplicated Number of Households with 1-3 Household Members (SDFB report = 1-3):	Duplicated Number of Households with 4 or more Household Members (SDFB report = 4+):	Total Number of "Bags" Distributed (SDFB report = Bags):
11	6	5	16

We recommend printing this page out and attaching it to your physical report. You will take these numbers and add them to any physical signatures you have and report them with your EFAP inventory report. Questions about EFAP reporting should be directed to Viannah Villagomez at vvillagomez@sandiegofoodbank.org

*For more information on how to read this report check out our other training materials (EFAP Report + EFAP Report Quick Glance)

Neighborhood Distribution Report

Questions about Neighborhood Distribution reporting should be directed to Belen at bgonzalez@sandiegofoodbank.org

Neighborhood Distribution Report

Report Filters

Include private records:	Yes
Date range:	Feb 22, 2023 to Feb 22, 2023
Category:	Food: Neighborhood Distribution Food

Report Summary

Assistance Records:	115
Total Cases Assisted:	**115**
Total Households Assisted:	**115 households with a total of 366 members**
Duplicated Households Assisted:	**115 households with a total of 366 members**

Diaper and Period Supplies Report

You will take these numbers and report them in google sheets. Questions about diaper reporting should be directed to Katie klemieux@sandiegofoodbank.org

Diaper Report

Report Filters

Include private records:	Yes
Date range:	Jan 01, 2022 to Mar 31, 2022
Categories:	Personal Care: Diaper: Newborn, Personal Care: Diaper: Size 1, Personal Care: Diaper: Size 2, Personal Care: Diaper: Size 3, Personal Care: Diaper: Size 4, Personal Care: Diaper: Size 5, Personal Care: Diaper: Size 6, Personal Care: Diapers, Personal Care: Period Supplies , Personal Care: Period Supplies: Pads, Personal Care: Period Supplies: Tampons, Personal Care: Wipes

Diapers

Unduplicated Household Count	8
Unduplicated Case Count Age 0-5	5

Diapers By Size [assistance unit totals]

General Diaper (package)	Diaper (package) Size 0	Diaper (package) Size 1	Diaper (package) Size 2	Diaper (package) Size 3	Diaper (package) Size 4	Diaper (package) Size 5	Diaper (package) Size 6	Total Packages	Total Diapers	Baby Wipes (package)
24.00	3.00	6.00	8.00	1.00	3.00	12.00	5.00	62.00	1550.00	0.00

Period Supplies

Unduplicated Household Count	0

Period Supplies By Type [assistance unit totals]

General Period Supplies (box)	Maxi Pads (box)	Tampons (box)	Total Boxes/People
0.00	0.00	0.00	0.00

ID CARDS

Use "Print ID Cards" report template

- Just click ID Cards title under Saved Reports
- Update dates for the correct data entry timeframe
- Prints all <u>cases that you created and added reprints for</u> (for any new cases, only those marked as "Head of Household" will print, no cards printed for dependents – any ID card that is scanned with a reprint ID card assistance will print regardless of whether it is HOH or not)

- Print up to 10 ID Cards per page

- Be sure to print single-sided and in color

- Laminate and organize in alphabetical order

Questions about ID cards reporting should be directed to the FEED team feed@sandiegofoodbank.org

*Image blurred to protect client information