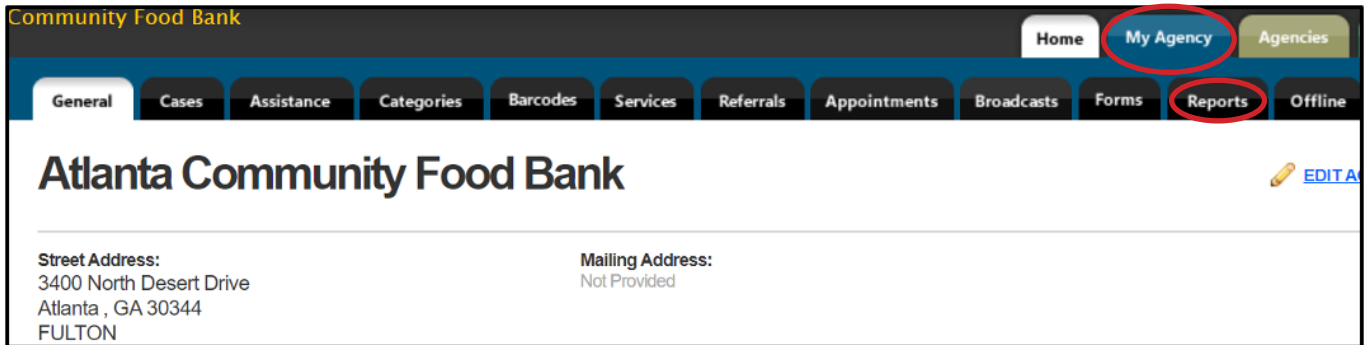


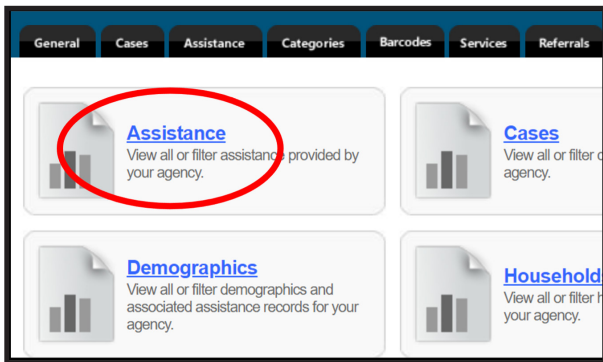
Depending on the types of food assistance your agency provides, up to three reports will need to be generated in Oasis in order to produce numbers that will be entered into your eHarvest account. These reports will provide neighbor numbers for general food assistance, TEFAP and GNAF.

► GENERAL REPORT SET-UP

1. Access agency reports by selecting the **“My Agency”** tab and then selecting **“Reports.”**

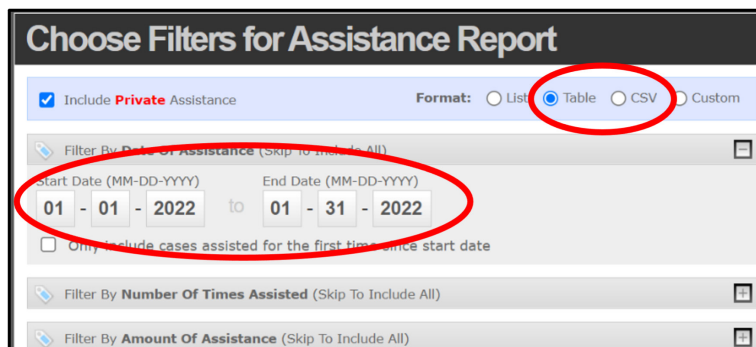


2. In the Reports section, select the **“Assistance”** option.



3. Once in the Assistance section, the following filters will be applied:
 - Table View
 - Date Range
 - Assistance Category

4. Select **“Table View”** under Format. This will produce a more consolidated report once completed. Agencies can create a copy of this report to conveniently use as a template for future reports.



- To generate neighbor numbers and poundage for general food assistance (non-TEFAP or GNAP), select all applicable options under **Assistance Category >> Food**.

Creating report templates for TEFAP and GNAP will be covered at the end of the toolkit

Filter By **Funding Source** (Skip To Include All)

Filter By **Assistance Category** (Skip To Include All)

Food

- ☒ Food: Client Choice
- ☒ Food: Combined Food Assistance
- ☒ Food: CSFP
- ☒ Food: Emergency Food
- ☒ Food: Food Pantry (General)
- ☒ Food: Food Pantry Visit
- ☒ Food: Holiday Box
- ☒ Food: Home Delivered
- ☒ Food: Meal-Lunch
- ☒ Food: Meal-Snack
- ☒ Food: Mobile Pantry
- ☒ Food: Prepack
- ☒ Food: Prepack / Client Choice
- ☒ Food: Produce Box
- ☒ Food: Senior Box

GNAP

- ☐ GNAP: GNAP - At-Risk
- ☐ GNAP: GNAP - TANF
- ☐ GNAP: GNAP - TANF Transitional

- Once the applicable filters have been applied, select **"Next"** to select which fields to display in the report. The neighbor assistance data can be sorted by date, assistance category, or case name. Choose whichever option you'd prefer.

Choose Fields for Report

Order Assistance By

- Oldest to Newest
- Newest to Oldest
- Category Name
- Case Name

- Each time an assistance report is generated, six checkboxes are selected by default under the **"Assistance Summary Report Fields"** section. To display all relevant data for reporting, select ALL checkboxes under this section.

Default View

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, Education, Marital status, Employment, At Risk Qualifiers, Other)
- ☒ Summary: Age ranges
- ☒ Summary: Case count
- ☒ Summary: New case count
- ☐ Summary: Household demographic totals (Gender, Ethnicity, Education, Marital status, Employment, At Risk Qualifiers, Other)
- ☒ Summary: Household age ranges
- ☒ Summary: Household count
- ☐ Summary: New household count
- ☐ Summary: Duplicated demographic totals (Gender, Ethnicity, Education, Marital status, Employment, At Risk Qualifiers, Other)
- ☐ Summary: Duplicated age ranges
- ☐ Summary: Duplicated count

Final View

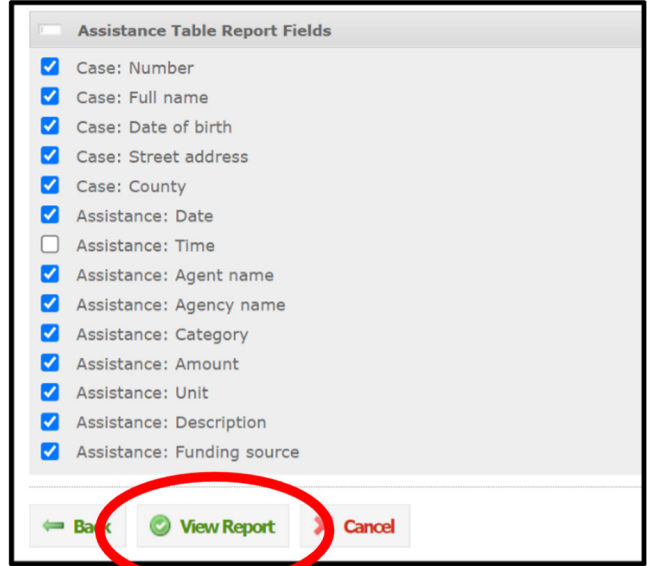
Report Sections To Include

- ☒ 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, Education, Marital status, Employment, At Risk Qualifiers, Other)
- ☒ Summary: Age ranges
- ☒ Summary: Case count
- ☒ Summary: New case count
- ☒ Summary: Household demographic totals (Gender, Ethnicity, Education, Marital status, Employment, At Risk Qualifiers, Other)
- ☒ Summary: Household age ranges
- ☒ Summary: Household count
- ☒ Summary: New household count
- ☒ Summary: Duplicated demographic totals (Gender, Ethnicity, Education, Marital status, Employment, At Risk Qualifiers, Other)
- ☒ Summary: Duplicated age ranges
- ☒ Summary: Duplicated count

8. The 'Assistance Table Report Fields' can stay in their default selections. Select **"View Report."**



Assistance Table Report Fields

- ☒ Case: Number
- ☒ Case: Full name
- ☒ Case: Date of birth
- ☒ Case: Street address
- ☒ Case: County
- ☒ Assistance: Date
- ☐ Assistance: Time
- ☒ Assistance: Agent name
- ☒ Assistance: Agency name
- ☒ Assistance: Category
- ☒ Assistance: Amount
- ☒ Assistance: Unit
- ☒ Assistance: Description
- ☒ Assistance: Funding source

Back View Report Cancel

REPORT VIEW

1. For food assistance, total pounds will be displayed at the beginning of the Report Summary section.



Atlanta Community Food Bank Agency

Report Filters

Include private records: Yes

Date range: Jan 01, 2022 to Jan 31, 2022

Categories: Food: Client Choice, Food: Combined Food Assistance, Food: CSFP, Food: Emergency Food, Food: Food Pantry (Holiday Box, Food: Home Delivered, Food: Meal-Lunch, Food: Meal-Snack, Food: Mobile Pantry, Food: Prepack, Produce Box, Food: Senior Box

Report Summary

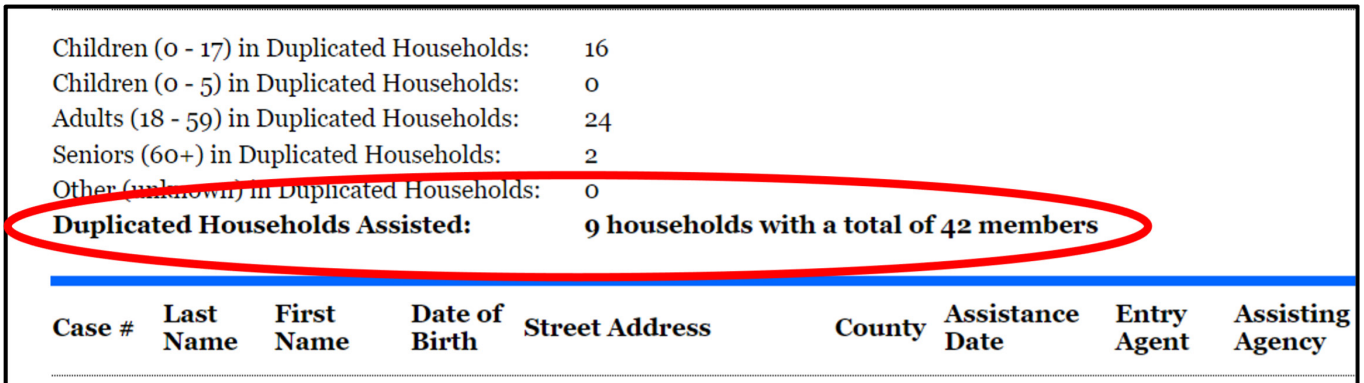
Total Assistance: \$ 0.00

Assistance Unit Totals:

Pounds: 565

Assistance Records: 9

2. Towards the bottom of the report (*just before the neighbor detail section*), duplicated neighbor data will be displayed. The duplicated neighbor numbers displayed here can be entered into eHarvest.



Children (0 - 17) in Duplicated Households: 16

Children (0 - 5) in Duplicated Households: 0

Adults (18 - 59) in Duplicated Households: 24

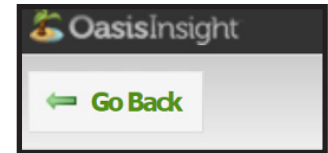
Seniors (60+) in Duplicated Households: 2

Other (unknown) in Duplicated Households: 0

Duplicated Households Assisted: 9 households with a total of 42 members

Case #	Last Name	First Name	Date of Birth	Street Address	County	Assistance Date	Entry Agent	Assisting Agency
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- Once your report has been generated and you are satisfied with the information, select **“Go Back”** on the top left of the report.



- Your pantry report will now be listed in the **“Recent Reports”** section of the Reports menu. Select **“Add to Saved Reports”** to move this report to the **“Saved Reports”** section.



- To use this report as a template for other reports, select **“Edit”** to the right of the report name. Rename your report **“Pantry Monthly Report TEMPLATE”** and then select ‘Save & Continue.’

MAKE NO CHANGES to the report filters and then select **“Save & Continue.”** On the **“Choose Fields for Pantry Template”** section, **MAKE NO CHANGES** and then select **“Save & Close”** to finalize your report.

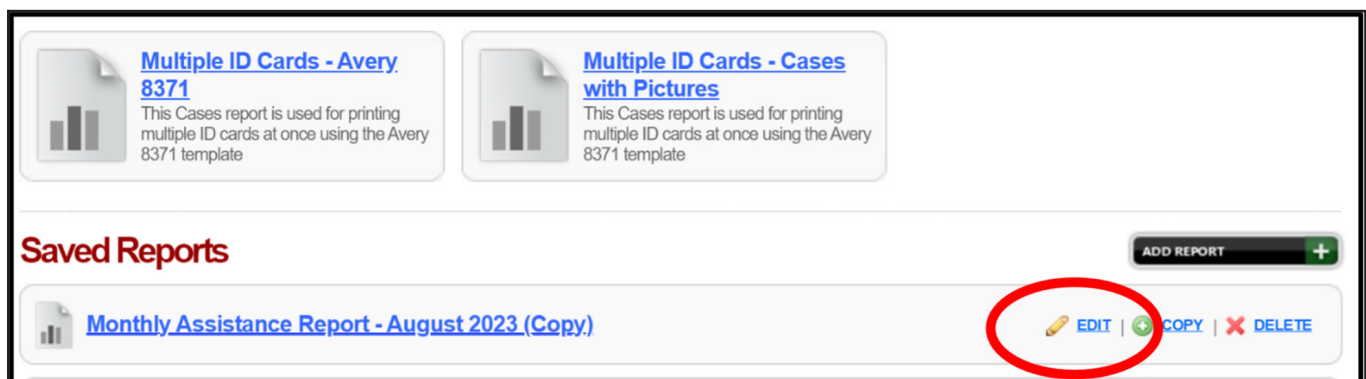


Your report template is now ready to be used to quickly create future pantry reports and GNAP & TEFAP monthly reports.

Creating Templates for Future Report

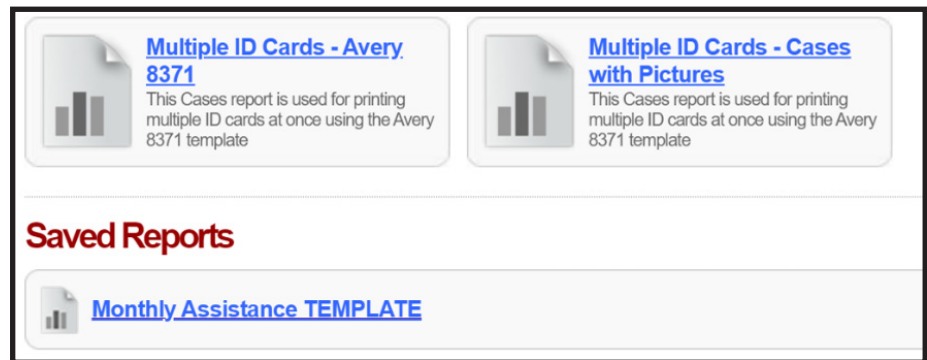
To use your pantry report template as the basis for reporting client numbers in subsequent months, follow these simple steps:

- On the right side of the saved pantry template, select **“Copy.”** A duplicate of your template with **“(Copy)”** to the right of the name will appear above the template.



2. Select **“Edit”** on the right of the copy.

3. Rename your report
**“Pantry Report (Month)
(Year).”**



Once the template is finalized, make NO CHANGES to it. For subsequent months, simply copy the report, change the title to match the month/year you are reporting on and change the date range. That’s it!

► GNAF & TEFAP REPORT VIEW

Once the general food pantry report has been created, you can use this report to create a template that will be the foundation for other reports your agency may need. The process is very similar to your agency’s monthly reports.

1. Starting with your **Monthly Assistance TEMPLATE**, select **“Copy.”**

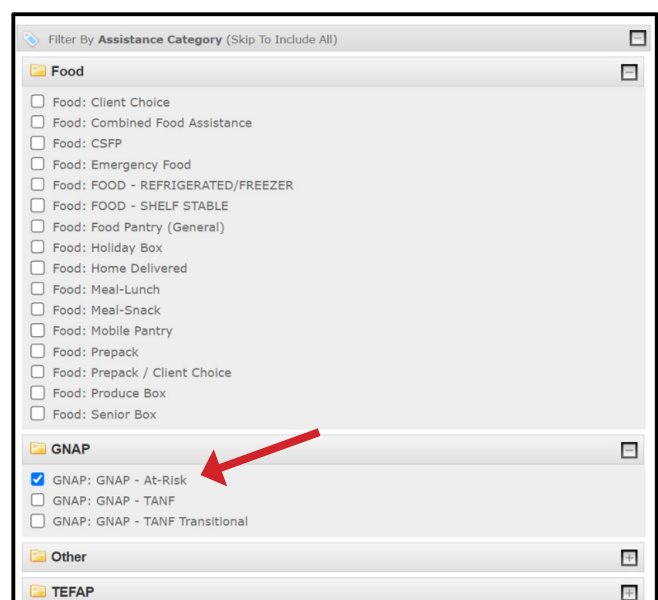


2. Once a copy of your template appears, select **“Edit.”**

3. Change the report title to **Monthly GNAF Report – TEMPLATE** and select **“Save & Continue”**.

4. Deselect ALL checkboxes under the Food category and select the **“GNAF: GNAF – At-Risk”** box.

5. Select **“Save & Continue”** and (without making any additional changes to the template) select **“Save & View Report.”**



6. To create a TEFAP Report template, follow the same steps as above but select the **“TEFAP: TEFAP – Electronic Signature”** checkbox.

☐ GNAP: GNAP - At-Risk
☐ GNAP: GNAP - TANF
☐ GNAP: GNAP - TANF Transitional
Other
TEFAP
☐ TEFAP: TEFAP
☒ TEFAP: TEFAP - Electronic Signature
☐ TEFAP: TEFAP - Paper Form
 Filter By **Other Assistance Fields** (Skip To Include All)
 Filter By **Demographic Profile Match** (Skip To Include All)

► FINAL VIEW

Once you have created all your templates, your **“Saved Reports”** view should look like this:

[Multiple ID Cards - Avery 8371](#)
 This Cases report is used for printing multiple ID cards at once using the Avery 8371 template
[Multiple ID Cards - Cases with Pictures](#)
 This Cases report is used for printing multiple ID cards at once using the Avery 8371 template
Saved Reports ADD REPORT +
[Monthly TEFAP Report - TEMPLATE](#) EDIT COPY DELETE
[Monthly GNAP Report - TEMPLATE](#) EDIT COPY DELETE
[Monthly Assistance TEMPLATE](#) EDIT COPY DELETE

The report templates can be left unedited going forward. When a new report is needed, simply make a copy of the template. You will need to rename it to match the month you are reporting on and update the date range. As you add reports, the **“Saved Reports”** view should appear as such:

[Multiple ID Cards - Avery 8371](#)
 This Cases report is used for printing multiple ID cards at once using the Avery 8371 template
[Multiple ID Cards - Cases with Pictures](#)
 This Cases report is used for printing multiple ID cards at once using the Avery 8371 template
Saved Reports ADD REPORT +
[Monthly Assistance Report - Aug 2023](#) EDIT COPY DELETE
[Monthly TEFAP Report - TEMPLATE](#) EDIT COPY DELETE
[Monthly GNAP Report - TEMPLATE](#) EDIT COPY DELETE
[Monthly Assistance TEMPLATE](#) EDIT COPY DELETE