**OVERVIEW**

- **Verify that the household qualifies**
  - Valid photo ID, qualifying income of 100% poverty or below,

- **Certify client for USDA**
  - Update information, enter date of first assistance, check 3-month recertification for clients who are currently homeless or have no source of income

- **One assistance per month**
  - Oasis will tell you if you try to add an assistance too early

- **Recertification**
  - Go over the 3 recertification questions and change the date of first assistance
    1. What is your current address?
    2. How many people are living in your home?
    3. What are all of the individual incomes in the household?

- **Add assistance**
  - Change category of food, number of boxes provided, and get client signature

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**STEP-BY-STEP USDA CLIENT INTAKE**

1. **Open Google Chrome & login to Oasis**
   - See module 1 resources for installing google chrome & accessing Oasis (www.nwafoodbank.oasisinsight.net)

2. **Search for client**
   - Be sure to check client has valid photo ID—they are required to show ID to receive USDA food.
   - Click “search” near top left of screen, under Oasis Insight Logo
   - *First time only* click “Advanced Search”, after the first time it will default to advanced search.
   - Try two search parameters before adding new case.
   - If found, skip to step 4 for “Check date of client USDA certification”.
   - If not found, move to next step for “Adding new case”.

3. **Add new case & relationships**
   - Click “Add new case” on left hand side of screen near top and Oasis Insight Logo.
   - Fill in corresponding info.
   - Add all household relationships.

4. **Check date of client USDA certification**
   - Check whether client has an updated USDA certification by looking at the date on the far right of the screen.
   - If client has up-to-date certification, move to step 7.
   - If client needs to update certification (a red banner will appear at the top indicating outdated USDA certification), move to step 6.
   - If it is a new client who has never been certified, move to step 5.

5. **Certify new clients**
   - Once all client information and relationship information are added into the system, you will look at the client income poverty rate in the personal info tab under “Income—Household:”
### 6. Re-certify a client

- If the client certifies for USDA, click “EDIT CASE” under the “Personal Info” tab and click on “Income and Expenses”
- Scroll to USDA Recertification and enter today’s date for USDA—
- Leave the 3-month recertification box unchecked unless the client is homeless or there is no source of income for the household.
- Save changes.
- Move to step 7

### 7. Add USDA assistance

- When a certification is outdated a red banner with appear at the top of the client screen
- To recertify a client, ask the following 3 questions and update information as necessary:
  - 1) What is your current address?
  - 2) How many individuals are living in the household?
  - 3) And lastly, what are the different income sources for all individuals in the household (Navigate to the edit case window, and check the information is updated and they have included Government Benefits like Social Security and disability)?
- Save any changes
- Check that poverty rate in personal info tab is less than 101%, if so, move forward with recertification. If not, client no longer certifies and will need to receive a different assistance.
- If the client still qualifies, you will now edit the case again and navigate to the “Income & Expenses” tab to change the USDA Recertification for today’s date.
- Recall that we check the 3 Month Recertification for clients who are homeless or do not have a source of income.
- After recertifying the client, you will proceed to add the assistance.

- Click the “Assistance” tab and select “ADD ASSISTANCE”.
- Enter the correct number of boxes being provided, per the guidelines of your agency
- Switch the category to “Food: USDA Redistribution”.
- A screen prompting the client to sign for assistance received will appear. If contactless procedures prevent you from allowing clients to sign, please use the “Insert COVID-19 Signature” button and wait for the signature to submit automatically
- If you need to make any changes, use the “EDIT” button to the right of the assistance that was added.
- If the client has already received assistance for that month, Oasis will notify you, do not provide them with a second USDA distribution.