

How to Add a Referral



***Client must consent
to be contacted
by the FoodBank and
Sign the Client ROI***

1. Go to Add Referral
2. Select Referral Type
 - SNAP – Food Stamps
 - Free Tax Preparation
 - Health Care Navigator
 - Multiple Benefits

Done!



To Login to CMT go to :

www.foodbankmoc.oasisinsight.net

**Note – The Client Release of Information (ROI) should be signed by all clients.
The client must give consent to be contacted by the FoodBank.**

To Run Electronic USDA/TEFAP and SFPP Reports

Go to Reports - Select TEFAP monthly Reports and enter the date range.

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Client Management Tool

Quick Reference Guide

A user-friendly software system for easy Client Case Management offering electronic USDA/TEFAP and SFPP reporting and easy referrals to the FoodBank's Benefits Outreach Team.



FEEDING AMERICA
A member of



Client Arrives

1. Search
2. If not found - Search Again
3. Decide: New Client
or Returning Client

New Client

1. Add New Case
2. Complete Client Questionnaire
 - Identification
 - Income & Expenses
 - Demographics
3. Save the Client Case Record
4. Add Family Members
5. Have Client Sign ROI
6. Take Client Photo
7. Go to How to Add Assistance

Returning Client

1. Click on Client Case Record
2. Update any Needed Information
3. Go to Add Assistance

How to Add an Assistance

Clients can only receive
USDA/TEFAP & SFPP assistance
one time per calendar month
per pantry.

1. Go to Add Assistance
2. Select Assistance Type
 - USDA/TEFAP & SFPP
 - Non-Government Food
 - Gift Cards
 - Other - Clothing, etc.
3. Client Signs for Assistance,
if required.



Client Questionnaire

1. For all clients complete the questionnaire

Sections:

Identification

Income & Expense

Demographics

2. Then add

Relationships

3. Then add

Notes and/or Alerts

if needed

Done!

*The FoodBank's mission is to alleviate hunger
and build food security in Monmouth and
Ocean Counties*

Contact Us

FoodBank of Monmouth and
Ocean Counties
3300 Route 66
Neptune, NJ 07753
732 918-2600

Vivian Martinez
vmartinez@foodbankmoc.org
www.foodbankmoc.org