

## M3 Section Seven

### **How To Setup A Local Program**

#### **Local Program Tree Structure – Creating the APC**

##### **Setting Up a Local Program**

The Local Program tree structure is created with an ‘Agency’, ‘Program’, ‘County’, and ‘Grant’ developing the “APC”. After the ‘tree structure’ is created, then the manager can create a grant and allocate the grant funds to the APC branches which include the ‘Parent-Level’ agency and the ‘County-Level’ agencies (or sub-agencies).

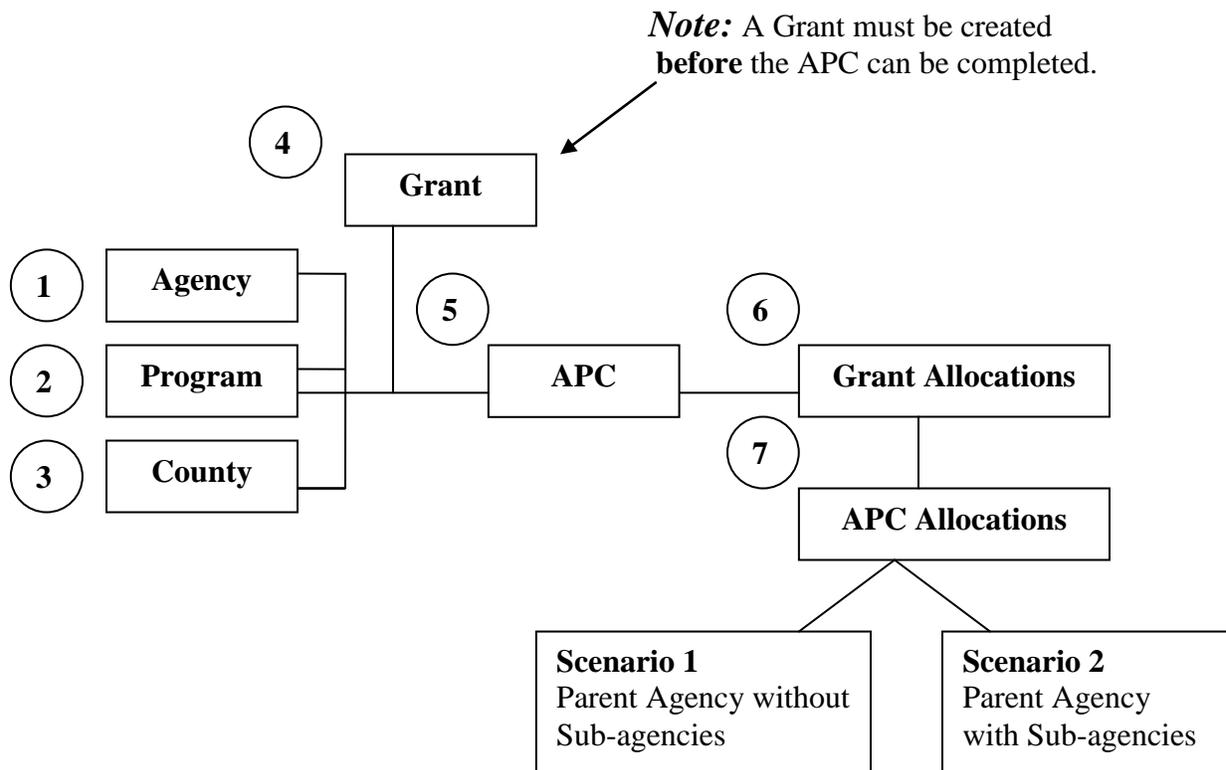
**Note:** For all agencies and/or programs created; LIHEAP-OEAP ‘Energy’ programs can be viewed by all agencies delivering LIHEAP-OEAP ‘Energy’ services.

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## Creating a Local Program

A Local Program tree structure is created with **1-Agency**, **2-Program**, **3-County**, and **4-Grant**. The tree structure includes the necessary components to be able to allocate funds from the grant level to the agency level and to make funds available for client assistance. The structure produces objects called an APC. After the tree structure is created, a manager can allocate grant funds from a 'Parent-Level' APC to a 'Child-Level' agency or sub-agencies to be used for local program payments.

### Local Program Tree Structure

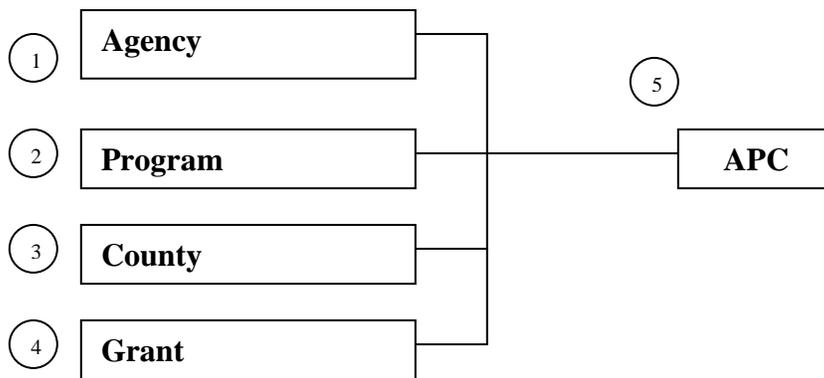


The first step to “Creating a Local Program” is to create the ‘*Agency*’ branch of the tree. Reference “Create an Agency.”

## Create an Agency

Agencies using OPUS will most likely have their agency initially built by OHCS. The agency “Manager” role has the ability to edit and update agency information, i.e.; address and phone numbers, as needed. If an agency needs to create another agency (sub-agency) it can be built by the main agency (CAP) who receives the initial funding. When an agency creates a sub-agency in OPUS, it is viewed by other Community Action Agencies (CAA) *within the same module(s)*.

Before creating a new agency or sub-agency; standard operating procedure (SOP) is to conduct a search for a specific ‘APC’. A search for an agency is done by using the ‘Main Menu’ > ‘Management’ > ‘Agency’ (reference Figure 7-1).



1

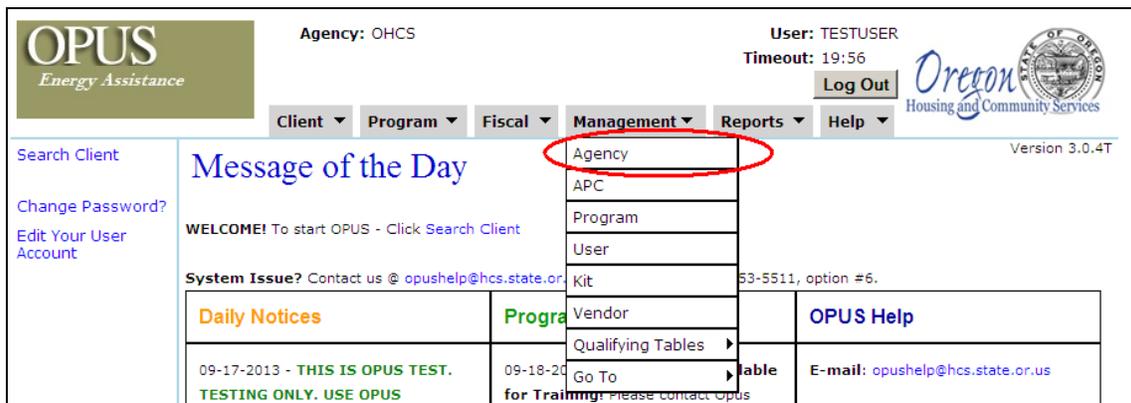


Figure 7-1: Management - Agency Dropdown

Using the ‘Agency Search’ screen, enter the acronym of the agency or the agency name and click the ‘Search’ button (reference Figure 7-1A).

OPUS Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:59  
Log Out

Client ▾ Program ▾ Fiscal ▾ Management ▾ Reports ▾ Help ▾

Search  
Agency  
APC  
Program  
Vendor  
User  
Kit

Agency  
New  
View  
Edit

### Agency Search

Enter Search Parameters (results limited to 500 rows)

Agency Name:

Abbreviation:

Address:

Phone:

Search

**About Results:**  
Click [Agency Name](#) to View Agency screen  
If no results, you can create a [Add Agency](#)

Agency Name	Abbrev	Address	Phone
<a href="#">OREGON HOUSING AND COMMUNITY SERVICES</a>	OHCS	725 SUMMER ST NE STE B SALEM, OR 97301-4246	503-986-2000

Data Classification: 1

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Figure 7-1A: Agency Search with Results Screen

If the agency exists the Agency name will appear in ‘Search Results’. Click on the Agency Name under the link.

The ‘Agency View’ screen will appear (reference Figure 7-1B).

OPUS Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:55  
Log Out

Client ▾ Program ▾ Fiscal ▾ Management ▾ Reports ▾ Help ▾

Search  
Agency  
APC  
Program  
Vendor  
User  
Kit

Agency  
New  
View  
Edit

### Agency View

**Agency Info**

Name: OREGON HOUSING AND COMMUNITY SERVICES  
Tax Id: 5452323  
Abbreviation: OHCS  
Subgrantee: N  
Mail Code:  
Entity Type: -9-NA  
Vendor #:  
Stan Profile

[Edit Agency](#)

**Contact Info**

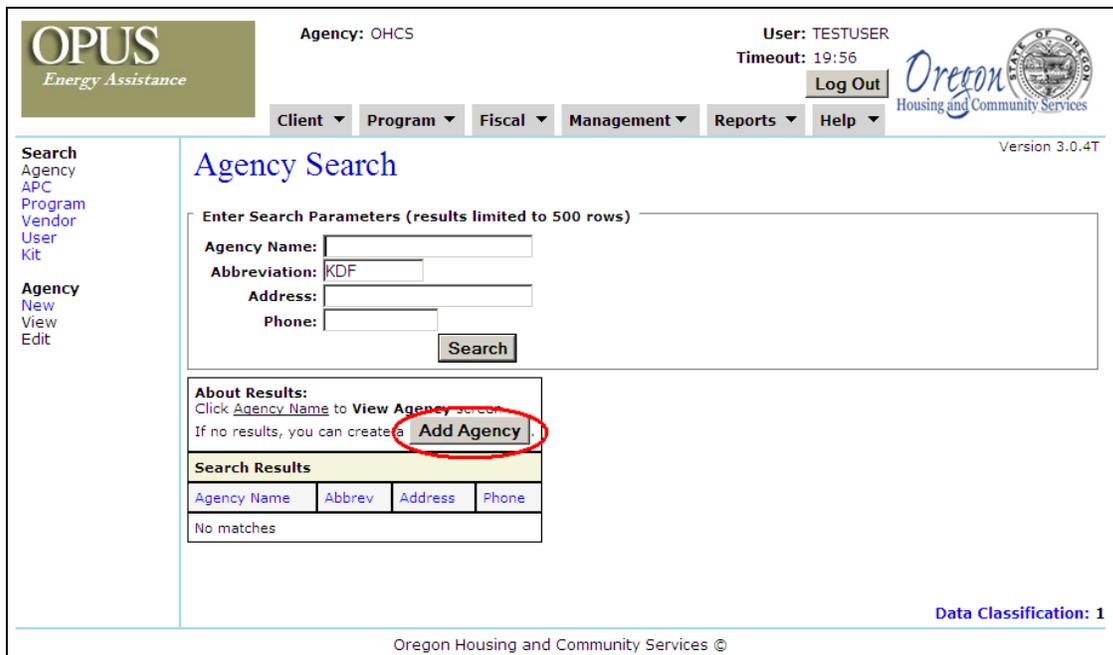
Phone: (503) 986-2000  
Fax: (503) 986-2020  
Physical Address: 725 SUMMER ST NE STE B SALEM, OR 97301-4246  
Mailing Address: 725 SUMMER ST NE STE B SALEM, OR 97301-4246

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-1B: Agency View Screen – Edit Agency.

To edit an agency’s information use the ‘Edit Agency’ button (reference Figure 7-1B).



**Figure 7-1C:** Agency View Screen – Add Agency.

To create a new agency, use the ‘Add Agency’ button located above the “Search Results’ section (*reference Figure 7-1C*).

If the ‘Program’ hasn’t been created yet, the next step is creating the program.

## Create a Program

Once an agency has been created, the ‘Program’ tree is ready to be completed. From the ‘Main Menu’, scroll the mouse over ‘Management’ and click ‘Program’ (*reference Figure 7-2*).

The ‘Program Search’ screen appears (*referenced Figure 7-2A*).

- 1) Search for the program name before creating a new program to ensure the program is not duplicated.
- 2) Search for the code name before creating a new program to ensure the program is not duplicated.

NOTE: Do these searches individually, **DO NOT COMBINE THESE SEARCHES!!!** If either are in use, you will need to modify either your program name or code and search again.

As shown below, there was a search for the program ‘First Steps’, which ‘Search Results’ indicates ‘No Matches’.

2

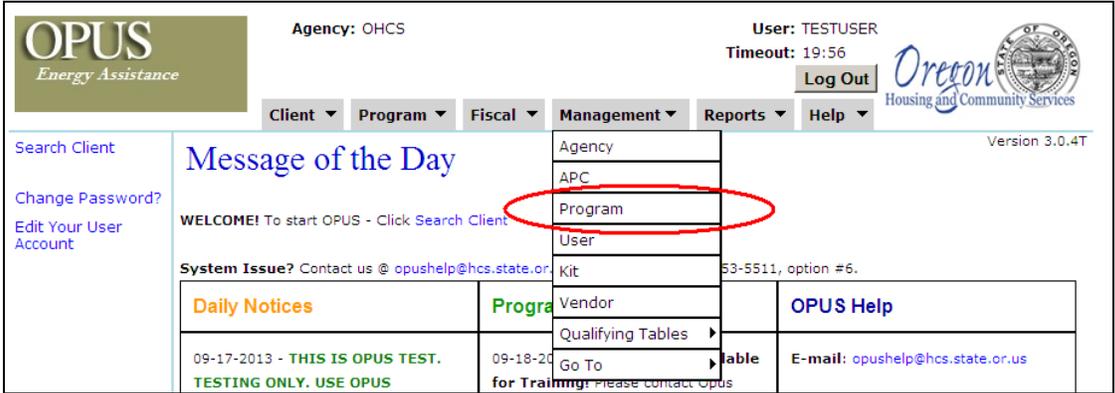


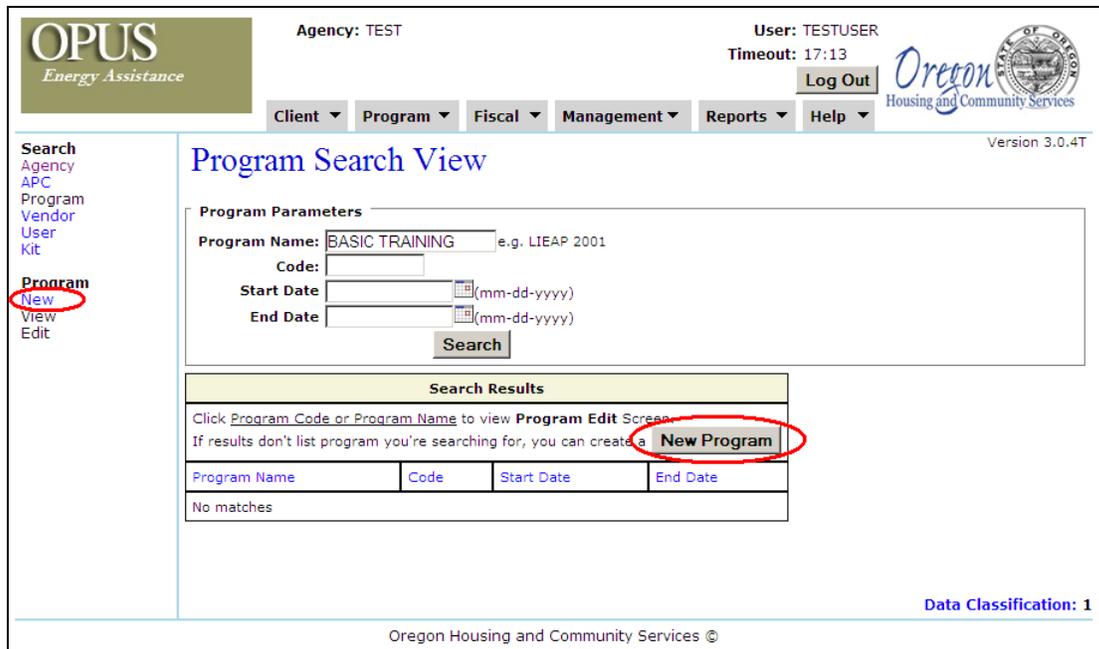
Figure 7-2: Management – Program Dropdown



Figure 7-2A: Program Search Screen by Program Name with “No Matches”.



**Figure 7-2B:** Program Search Screen by Code with “No Matches”.



**Figure 7-3:** Program Search Screen - New Link and New Program button

Using the ‘Left Nav Bar’ under ‘Program’ click the ‘New’ link or the ‘New Program’ button (reference Figure 7-3).

The 'Program New' screen will appear (reference Figure 7-4A).

Enter or Select the following

- Program Name
- Program Code
- Program Type (Set to 'Local' if you wish it to mirror LIHEAP contact OPUS Helpdesk)
- Effective Program Start Date
- Effective Program End Date
- Shared (selection allows other agencies to edit the program)
- Income Qualification Type (Decide if you want the local program to have the household income qualified)
- Income Qualification Percent (What percentage or lower do you want for the household to qualify)
- Income Qualification Year (pick what income year chart do you wish for qualification).
- SSN Verify (leave unchecked)
- Age Verify (leave unchecked)

After all information has been enter or selected, click "Save" button.

The screenshot shows the 'Program New' screen in the OPUS Energy Assistance system. The header includes the OPUS logo, 'Agency: TEST', 'User: TESTUSER', and 'Timeout: 19:55'. A 'Log Out' button is present. A navigation menu contains 'Client', 'Program', 'Fiscal', 'Management', 'Reports', and 'Help'. A search sidebar on the left lists 'Agency', 'APC', 'Program', 'Vendor', 'User', and 'Kit'. The main form area is titled 'Program New' and contains two sections: 'Program' and 'Income Qualification'. The 'Program' section has fields for 'Name', 'Code', 'Type', 'Start Date', 'End Date', and a 'Shared' checkbox. The 'Income Qualification' section has fields for 'Type', 'SSN Verify', and 'Age Verify'. A 'Save' button is highlighted with a red circle. The footer includes 'Oregon Housing and Community Services ©' and 'Data Classification: 1'.

Figure 7-4A: Program New Screen.

The next screen that will appear is the 'Program View' screen. Verify that all program information you entered is correct (reference Figure 7-4B)

**OPUS Energy Assistance** Agency: TEST User: TESTUSER Timeout: 19:59 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help Version 3.0.4T

### Program View

**Program Info**

Name: BASIC TRAINING Code: BCT14 Type: LOCAL  
 Agency: TEST Shared? N  
 Start Date: 10-01-2013 End Date: 09-30-2014

**Income Qualifications**

Income Qualification: No  
 SSN Verify: N Age Verify: N  
 Edit Program

Payment Variables							
	Type(click to edit)	Min	Max	Total Max	Total #	LIHEAP	Tier
<input type="checkbox"/>	Crisis	1	500	500	1	N	4
<input type="checkbox"/>	Special	1	100	1000	99	N	4
<input type="checkbox"/>	Standard-Reg	50	50	99999	12	N	4

Check All Delete Add

Data Classification: 1  
 Oregon Housing and Community Services ©

**Figure 7-4B:** Program View Screen

Next set up the programs payments variables. This is the type of payments your program will make. All programs must have at one payment variable to be able to make a payment.

To create payment variables complete the following:

- 1) Select 'Add' button under payment variables
- 2) Payment Variables New Screen
  - A) Select Payment Type
  - B) 'Use LIHEAP Calculation' checkbox - leave unchecked
  - C) Select Tier 4 from dropdown for local programs
  - D) Enter payment minimum for each payment instance (if is fixed amount enter same value for minimum and maximum)
  - E) Enter payment maximum for each payment instance (if is fixed amount enter same value for minimum and maximum)
  - F) 'Payment Total Max' for all payments of this type for one household; what is the maximum total value of benefits that can be received.
  - G) 'Payment Total Count' how many of these payments can a household receive.

The following three figures (reference 6-5A through 6-5C) are examples of different payment types

**OPUS Energy Assistance** Agency: TEST User: TESTUSER Timeout: 19:26 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help

Search Agency APC Program Vendor User Kit Program New View Edit

### Payment Variables New

Version 3.0.4T

**Payment Variables Info**

Payment Type: Crisis \*

Use Liheap Calculation?:

Tier: 4 \*

Payment Min: 1 \*

Payment Max: 500 \*

Payment Total Max: 500 \*

Payment Total Count: 1 \*

Save

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-5A: One Time Payment

**OPUS Energy Assistance** Agency: TEST User: TESTUSER Timeout: 19:33 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help

Search Agency APC Program Vendor User Kit Program New View Edit

### Payment Variables New

Version 3.0.4T

**Payment Variables Info**

Payment Type: Standard-Reg \*

Use Liheap Calculation?:

Tier: 4 \*

Payment Min: 50 \*

Payment Max: 50 \*

Payment Total Max: 99999 \*

Payment Total Count: 12 \*

Save

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-5B: Recurring Payment



Agency: TEST

User: TESTUSER  
Timeout: 19:38  
[Log Out](#)



Client ▾
Program ▾
Fiscal ▾
Management ▾
Reports ▾
Help ▾

Version 3.0.4T

**Search**

[Agency](#)

[APC](#)

[Program](#)

[Vendor](#)

[User](#)

[Kit](#)

**Program**

[New](#)

[View](#)

[Edit](#)

## Payment Variables New

**Payment Variables Info**

Payment Type: Special \*

Use Liheap Calculation?:

Tier: 4 \*

Payment Min: 1 \*

Payment Max: 100 \*

Payment Total Max: 1000 \*

Payment Total Count: 99 \*

[Save](#)

**Data Classification: 1**

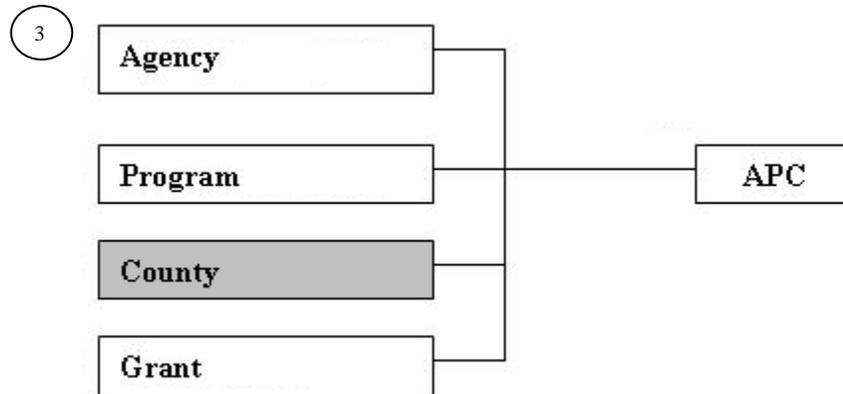
Oregon Housing and Community Services ©

**Figure 7-5C: Total Maximum Payment**

Working with the 'County' branch of the APC is next.

### Counties in the OPUS System

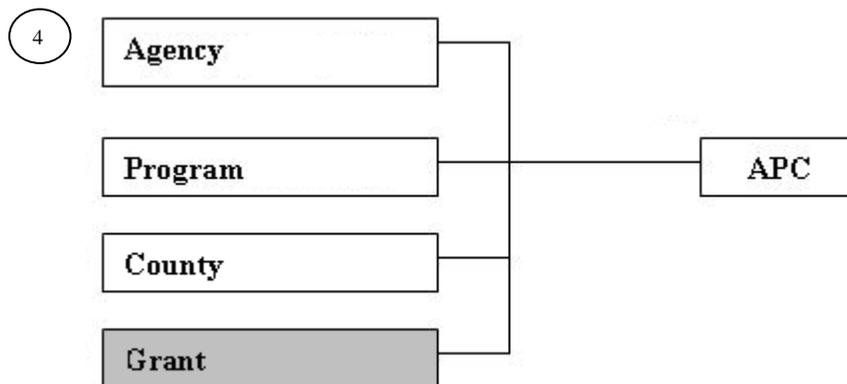
Since all counties have been initially created in the OPUS database, agencies don't need to complete this step. A County drop-down list is provided on all screens as you need to access them.



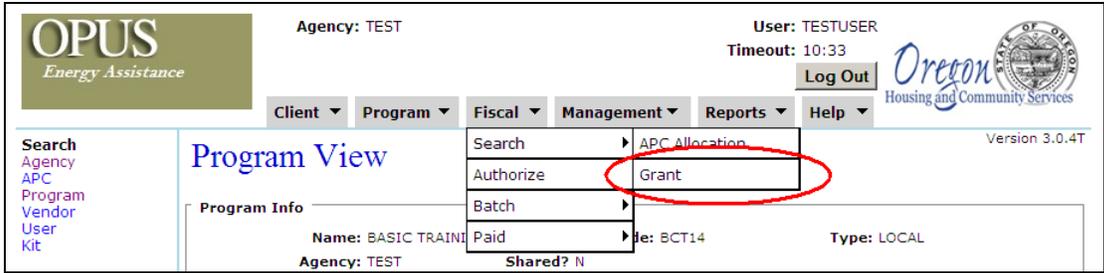
The next step is to create the Grant that the APC(s) will use for the program assistance funds.

### Create a Grant

A grant (funding source) must be created in OPUS in order to draw down funds for a 'Parent' agency level or for the 'Child' agency level to complete client assistance payments.



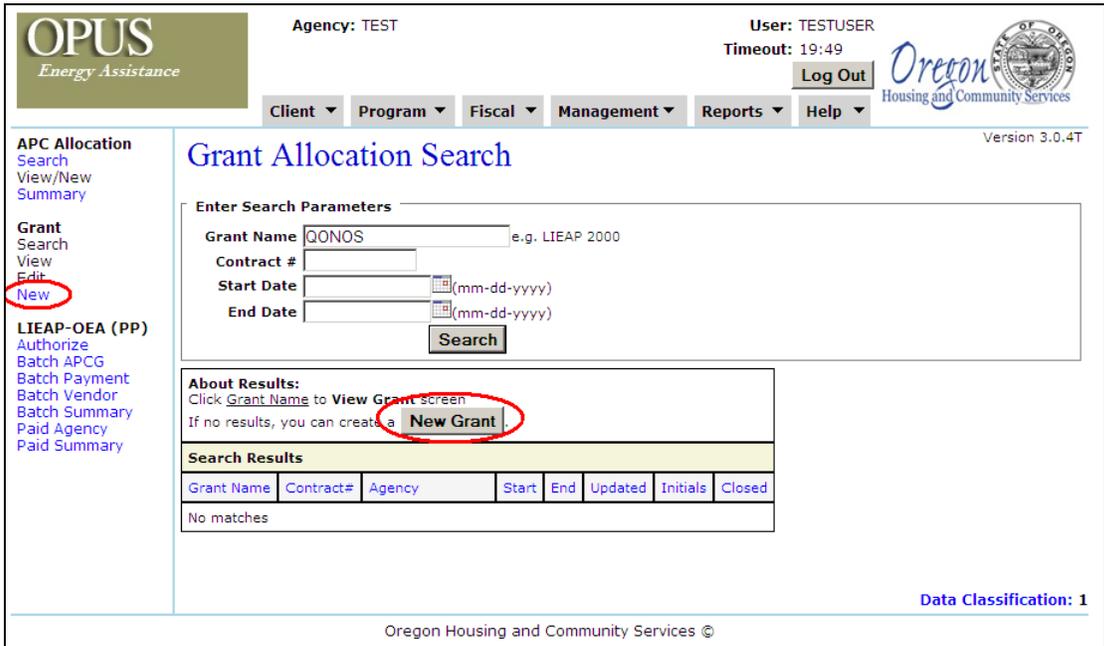
1. Using the 'Main Menu', scroll the mouse over 'Fiscal' down to 'Search', and in the menu, click Grant (*reference Figure 7-6A*). The 'Grant Allocation Search' screen will appear.



**Figure 7-6A:** Fiscal – Search - Grant Dropdown

**Note:** Complete a search for the grant name prior to creating a new grant to ensure the grant is not duplicated.

2. Enter the 'Grant Name' and click 'Search'. Once it has been determined the grant does not exist in the database (reference Figure 7-6B), click the 'New Grant' button or in the Left Nav Bar, under 'Grant', click the "New" link. The "Grant New" screen will appear.



**Figure 7-6B:** Grant Allocation Search Screen – New Grant.

3. Enter all the information. Fields with a red \* Asterisk are required (reference Figure 7-6C). Click the 'Save' button and the 'Grant Allocation View' screen will appear (reference Figure 7-6D).

OPUS Energy Assistance

Agency: TEST

User: TESTUSER  
Timeout: 19:58

Log Out

Client Program Fiscal Management Reports Help

Grant New

Grant Information (Fields marked with \* are required.)

Name: \*

Contract #: \*

Start Date:  (mm-dd-yyyy)\*

End Date:  (mm-dd-yyyy)\*

Agency: \*

Closed?

Save Changes

APC Allocation Search View/New Summary

Grant Search View Edit New

LIEAP-OEA (PP) Authorize Batch APCG Batch Payment Batch Vendor Batch Summary Paid Agency Paid Summary

Version 3.0.4T

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-6C: Grant New Screen.

OPUS Energy Assistance

Agency: TEST

User: TESTUSER  
Timeout: 19:32

Log Out

Client Program Fiscal Management Reports Help

Grant Allocation View

Grant Info

Grant: QONOS Agency: TEST

Contract # NA

Start Date: 10-01-2013

End Date: 09-30-2014 Closed? N

Edit Grant

Total Grant	Transferred Total	Total Remaining
\$0.00	\$0.00	\$0.00

Grant to/from APC Transfer New Allocation

Allocations

To Edit: Click Amount row to edit. The Grant Allocation Edit screen will appear next.

Amount	Allocation Date	Insert Date	User
No Allocations			

Grant APC Transfers

Amount	APC NAME	Move Date	Insert Date	User
No Transfers				

Version 3.0.4T

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-6D: Grant Allocation View Screen.

## Creating an APC

**Notice:** Before a grant can be **used**, the APC structure needs to be completed.

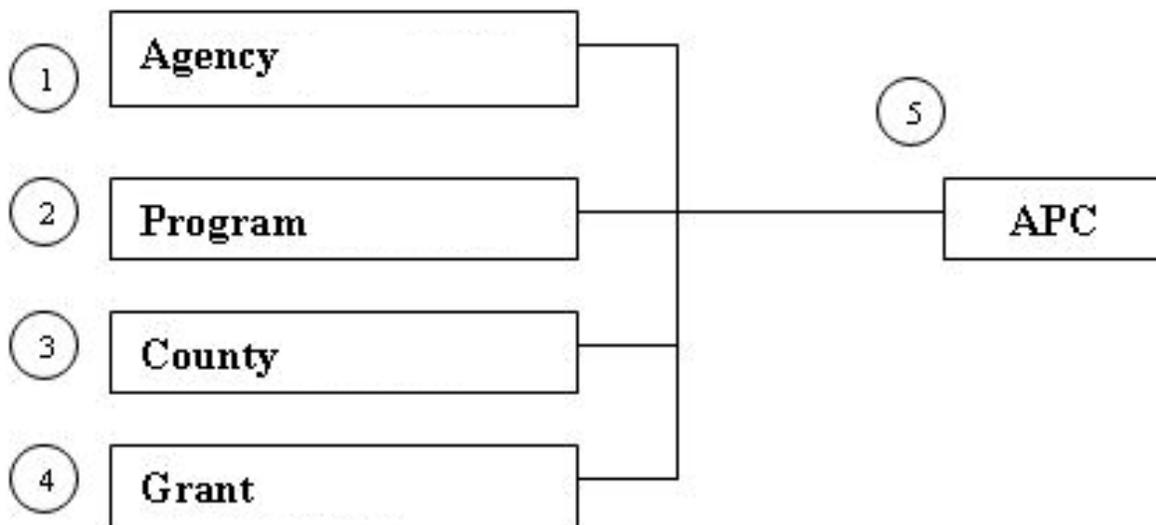
\*\*Complete a search for any APC combination with the agency and/or program name created to ensure the grant is not duplicated.

Agencies can **or** will have 'Local Programs'. 'Local Programs' are programs **not** funded through OHCS. A 'Parent' APC is required to be created first to be the starting point to draw grant funds. Every Community Action Agency (CAA) is the 'Parent' agency. The subgrantee(s) or known as sub-agency. Sub-agencies are the 'Child' agency or agencies. A 'Parent' agency can have one sub-agency or multiple sub-agencies. Agencies can, within itself, be the only agency who can be the 'Parent' and 'Child' with a county.

**Note:** Agencies who receive funding from OHCS **will not** build an APC. The APC will be created by OHCS Staff.

To better understand a 'Parent' APC versus a 'Child' agency, see the diagram below.

## APC Tree Structure



Building the Agency, Program, County (if applicable) and the Grant together, the APC is completed. Below, the screen shots show how the structure is completed.

## Creating an APC, Parent and Child

1. Using the 'Main Menu', scroll the mouse over 'Management' and click the item 'APC' (reference Figure 7-7). The APC Search screen will appear (reference Figure 7-7A).

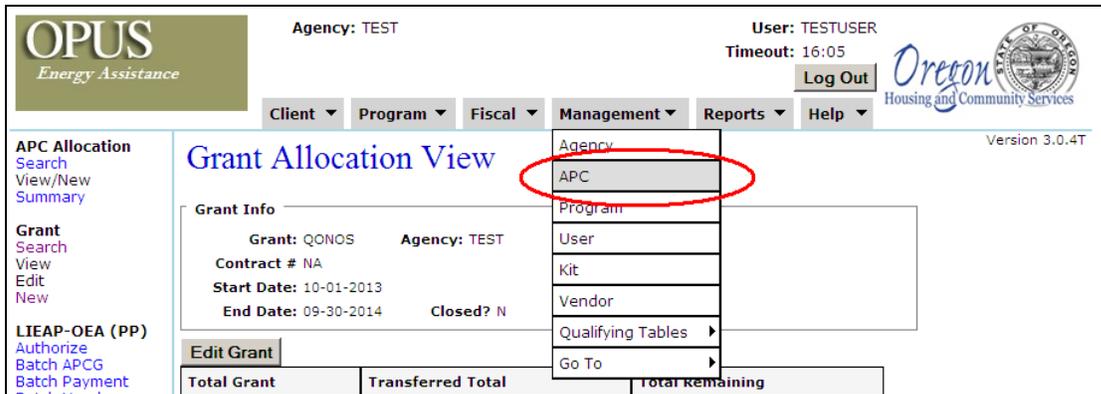


Figure 7-7: Management - APC Dropdown

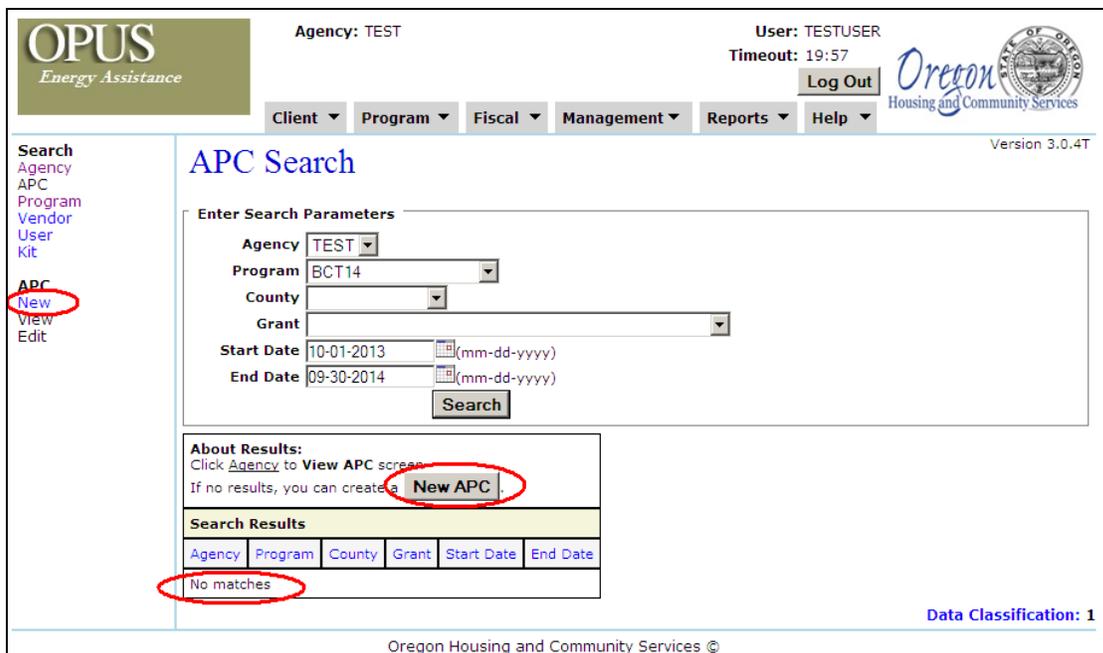


Figure 7-7A: APC Search Screen - No Matches

If the 'Search Results' indicates 'No Matches', a new APC can be created (reference Figure 7-7A).

2. Using the Left Nav Bar, under 'APC', click the 'New' link or the "New APC" button located in the 'About Results' section. The 'APC New' screen will appear (reference Figure 7-7B).

3. Complete all required information:
- Agency Name
  - Program
  - Grant
  - Start Date
  - End Date

The screenshot displays the 'APC New' form in the OPUS Energy Assistance system. The form is titled 'APC = Agency/Program/County' and contains the following fields:

- Agency Name: TEST \*
- Sub Agency to: (blank) ← Leave Blank for Parent APC
- County: (blank)
- Program: BCT14 \*
- Grant: QONOS-TEST \*
- Start Date: 10-01-2013 (mm-dd-yyyy) \*
- End Date: 09-30-2014 (mm-dd-yyyy) \*

A 'Save' button is located at the bottom of the form. The interface also includes a search menu on the left, navigation tabs (Client, Program, Fiscal, Management, Reports, Help), and a footer with 'Oregon Housing and Community Services ©' and 'Data Classification: 1'.

**Figure 7-7B:** APC New 'Parent' screen.

Click the 'Save' button. The APC View screen will appear (*reference Figure 7-7C*). Verify that the information in the APC is correct. *Figure 7-7C* is the 'Parent' APC.



Figure 7-7C: “Parent” APC View screen.

To create a ‘Child’ APC, follow the same steps as used for building a ‘Parent’ APC listed above. The ‘Child’ APC created after the ‘Parent’ APC, is in fact, the ‘Parent’ agency recreated but with a designated county. Enter all appropriate information and click ‘Save’ (reference Figure 7-7D). The APC View screen will appear (reference Figure 7-7E).

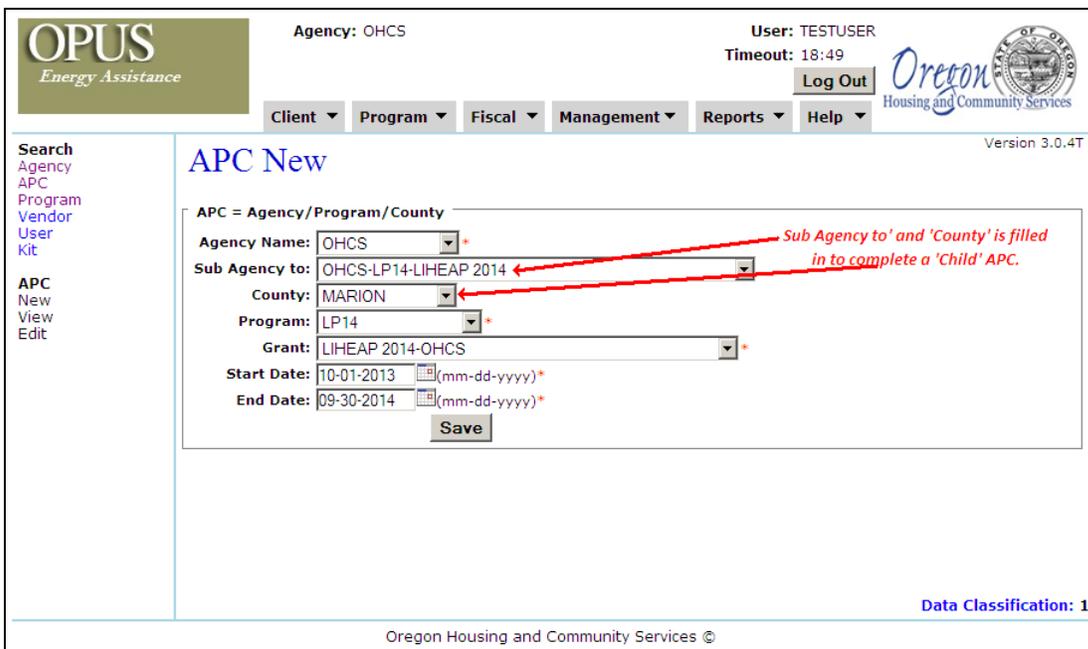


Figure 7-7D: APC New – ‘Child’ screen.


Agency: OHCS
User: TESTUSER  
Timeout: 19:48  
[Log Out](#)


Client ▾ Program ▾ Fiscal ▾ Management ▾ Reports ▾ Help ▾
Version 3.0.4T

**Search**

[Agency](#)

[APC](#)

[Program](#)

[Vendor](#)

[User](#)

[Kit](#)

**APC**

[New](#)

[View](#)

[Edit](#)

## APC View

APC = Agency/Program/County

APC **OHCS-LP14-MAR-LIHEAP 2014**

Start Date 09-01-2013 End Date 09-30-2014

Sub APC to

Sub APC's

Child

Program

Child Level

Grant

Edit APC

Delete APC

**Data Classification: 1**

Oregon Housing and Community Services ©

**Figure 7-7E:** APC View –‘Child’ APC screen.

## Verifying the APC Structure

Verifying an APC structure can be done by using the 'APC Search' screen.

1. On the 'Main Menu', scroll the mouse over 'Management' and click 'APC'. The APC Search screen will appear (*reference Figure 7-8*).

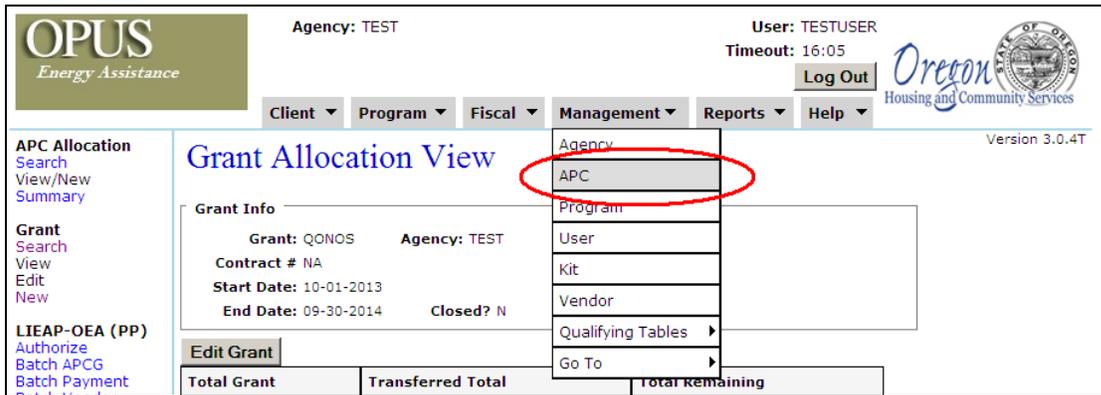


Figure 7-8: Management - APC Search

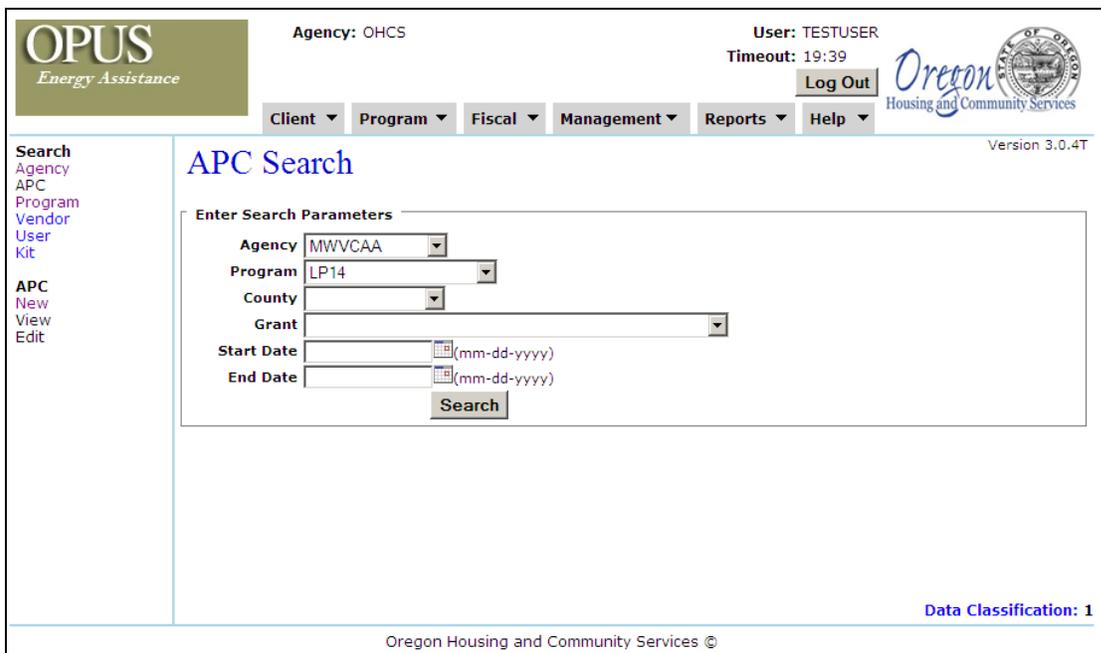


Figure 7-8A: APC Search Screen

2. Using *only* the drop-down menus, select the 'Agency' and 'Program' (*reference Figure 7-8A*). These options will display an APC or multiple APCs using the specifications chosen (*reference Figure 7-8B*).

Agency: OHCS User: TESTUSER Timeout: 19:53 Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**APC Search**

Enter Search Parameters

Agency: MWVCAA  
 Program: LP14  
 County:   
 Grant:   
 Start Date: (mm-dd-yyyy)  
 End Date: (mm-dd-yyyy)  
 Search

**About Results:**  
 Click [Agency](#) to View APC screen  
 If no results, you can create a [New APC](#).

*Parent APC No County*  
*Child APC shown with County*

Agency	Program	County	Grant	Start Date	End Date
MWVCAA	LIHEAP 2014		LIHEAP 2014	09-01-2013	09-30-2014
MWVCAA	LIHEAP 2014	MARION	LIHEAP 2014	09-01-2013	09-30-2014
MWVCAA	LIHEAP 2014	POLK	LIHEAP 2014	09-01-2013	09-30-2014

Data Classification: 1

Oregon Housing and Community Services ©

**Figure 7-8B** APC Search with Search Results Screen

The agency ‘MWVCAA’ and the Program ‘LP14’ were selected for a search. In the ‘Search Results’ section, the ‘Parent’ APC with no county, and two ‘Child’ APCs are displayed. **Note:** “Child APCs” display a ‘County’.

This process distinguishes the difference from a ‘Parent’ and ‘Child’ APC. Grant allocations are ready for this program and issued to the ‘Child Level’ APC(s).

## Grant Allocation

Grant Allocations to agencies are funds assigned to a 'Parent APC' and then are allocated the 'Child APC(s)' or County level agencies.

1. From the 'Main Menu' to 'Fiscal' to 'Search', click on 'Grant' (reference Figure 7-9).. The 'Grant Search' screen will appear Enter the 'Grant' name and click 'Search' (reference Figure 7-9A). The grant should appear in 'Search Results'.

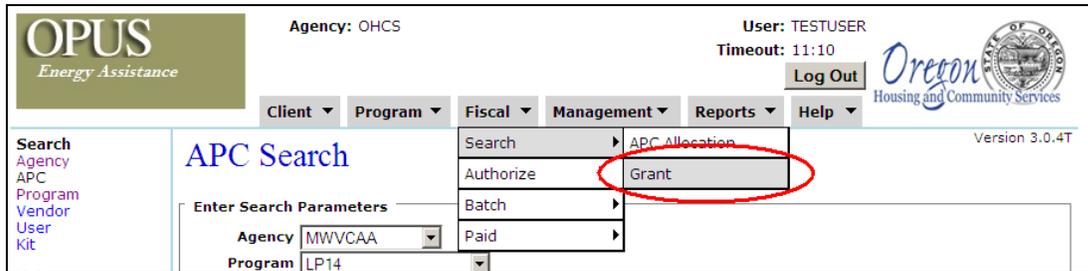


Figure 7-9: Fiscal – Search - Grant Dropdown



Figure 7-9A: Grant Allocation Search Screen with results

2. The 'Grant Allocation Search' screen will display with 'Search Results'. There are times when agencies can have more than one grant. The desired grant will need to be selected. To view the appropriate grant, click on the 'Grant' link under 'Search Results' (reference Figure 7-9A).

The 'Grant Allocation View' screen will display. The view screen allows verification of the designated amount of a grant allocated funds down to the associated APC agencies. The 'Total Grant', 'Transferred Total', 'Total Remaining' and dates are displayed (*reference Figure 7-9B*).

**OPUS Energy Assistance** Agency: OHCS User: TESTUSER Timeout: 15:51 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Grant Allocation View

**Grant Info**

Grant: LIHEAP 2014 Agency: OREGON HOUSING AND COMMUNITY SERVICES  
 Contract # NA  
 Start Date: 10-01-2013  
 End Date: 09-30-2014 Closed? N

**Edit Grant**

Total Grant	Transferred Total	Total Remaining
\$0.00	\$4,150,000.00	(\$4,150,000.00)

**Grant to/from APC Transfer** **New Allocation**

**Allocations**

To Edit: Click Amount row to edit. The Grant Allocation Edit screen will appear next.

Amount	Allocation Date	Insert Date	User
No Allocations			

**Grant APC Transfers**

Amount	APC NAME	Move Date	Insert Date	User
\$50,000.00	CINA FP-LP14-MAL-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	KLCAS-LP14-KLA-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-MOR-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-GIL-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-UMA-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-WHE-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-JEF-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-DES-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-CRO-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	MCCAC-LP14-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	MCCAC-LP14-HOO-LIHEAP 2014	09-16-2013	09-16-2013	BLH

Figure 7-9B: Grant Allocation View Screen

The button labeled 'Grant to/from APC Transfer' allows funds to be transferred down to 'Parent' and 'Child' APC levels (*Reference Figure 7-9B*). In some cases, the 'Grant to/from APC Transfer', allows transferring funds back up to the grant-level.

As funds are transferred down to the 'Parent' and 'Child' APC levels, the section labeled 'Grant APC Transfers' will display a history of transfers as they occur.

## New Grant Allocation

The purpose of the 'New Grant Allocation' is to set-up grant funds to be distributed to sub-agencies 'Child APCs'.

On the 'Grant Allocation View' screen, under the 'Allocations' section the funding amount is displayed. The 'Allocations' section will display a list of current and future allocations given to, or subtracted from, a grant.

1. On the 'Grant View' screen, click the button 'New Allocation' (*reference Figure 7-10*).

**OPUS Energy Assistance** Agency: OHCS User: TESTUSER Timeout: 15:51 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help

**Grant Allocation View** Version 3.0.4T

**Grant Info**

Grant: LIHEAP 2014 Agency: OREGON HOUSING AND COMMUNITY SERVICES  
 Contract # NA  
 Start Date: 10-01-2013  
 End Date: 09-30-2014 Closed? N

**Edit Grant**

Total Grant	Transferred Total	Total Remaining
\$0.00	\$4,150,000.00	(\$4,150,000.00)

**Grant to/from APC Transfer** **New Allocation**

**Allocations**

To Edit: Click Amount row to edit. The **Grant Allocation Edit** screen will appear next.

Amount	Allocation Date	Insert Date	User
No Allocations			

**Grant APC Transfers**

Amount	APC NAME	Move Date	Insert Date	User
\$50,000.00	CINA FP-LP14-MAL-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	KLCAS-LP14-KLA-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-MOR-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-GIL-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-UMA-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CAPECO-LP14-WHE-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-JEF-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-DES-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	NIMPACT-LP14-CRO-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	MCCAC-LP14-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	MCCAC-LP14-HOO-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	MCCAC-LP14-SHE-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	MCCAC-LP14-WAS-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CSC-LP14-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CSC-LP14-LIN-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CSC-LP14-LNC-LIHEAP 2014	09-16-2013	09-16-2013	BLH
\$50,000.00	CSC-LP14-BEN-LIHEAP 2014	09-16-2013	09-16-2013	BLH

Figure 7-10: Grant Allocation View Screen - 'New Allocation'.

- The 'Grant Allocation New' screen will appear (reference Figure 7-10A). The 'New Grant Allocation New' screen allows funds to be added (+) or subtracted (-) from a grant and the allocation date. When complete, click 'Save Allocation'.



Figure 7-10A: Grant Allocation New Screen.

The 'Grant Allocation View' screen will appear (reference Figure 7-10B). Confirmation of the allocation will be displayed under 'Allocations' section.

**Note:** the initials of the user completing the allocation adjustment will appear with the new entry (reference Figure 7-10B).

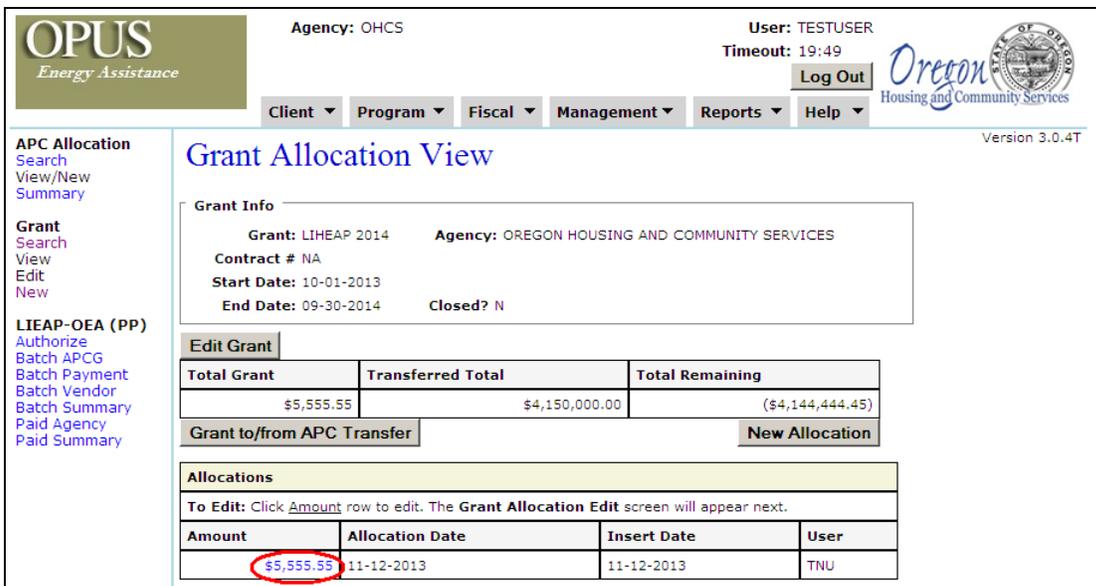


Figure 7-10B: Grant Allocation View Screen

The 'Amount' is a "link" indicated in [blue and underlined](#) (reference Figure 7-10B).

If the amount needs to be edited, click the actual dollar amount and the 'Grant Allocation Edit' screen will appear (reference Figure 7-10C). The funding can be edited to be added (+) or subtracted (-) from a grant and the allocation date can be edited. When complete, click 'Save Changes'.

The screenshot displays the 'Grant Allocation Edit' interface. At the top left is the 'OPUS Energy Assistance' logo. The header includes 'Agency: OHCS', 'User: TESTUSER', and 'Timeout: 18:58'. A 'Log Out' button is present. A navigation menu contains 'Client', 'Program', 'Fiscal', 'Management', 'Reports', and 'Help'. The main content area is titled 'Grant Allocation Edit' and includes a 'Save Changes' button. The form contains the following fields:

- Grant: LIHEAP 2014
- Amount (Select + or -): 5000.00
- Allocation Date: 11-12-2013

Fields marked with an \* are required. The page also features a 'Data Classification: 2' label and 'Oregon Housing and Community Services ©' at the bottom.

Figure 7-10C: Grant Allocation Edit Screen.

If the grant information needs to be edited complete the following steps.

Click on the 'Edit Grant' button or use the Left Nav Bar, under 'Grant' and click on 'Edit' (reference Figure 7-11). The grant name, contract number, start and end date, and agency can be edited.

Figure 7-11: Grant Edit Screen.

Click ‘Save Changes’, the ‘Grant Allocation View’ screen will appear (reference Figure 7-11A, next page).

**Note:** Funding amounts cannot be edited in this field.

Figure 7-11A: Grant Allocation View Screen.

## Move Grant/APC

To allocate grant funds down to the ‘Parent’ APC level (no county), so specific amounts can be drawn down to the ‘Child’ APC(s) level for program assistance payments, funds must be moved.

Using the ‘Grant Allocation View’, click on ‘Grant to/from APC Transfer’ button (*reference Figure 7-12A*).

OPUS Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 14:39  
Log Out

Client Program Fiscal Management Reports Help

Oregon Housing and Community Services

Version 3.0.4T

### Grant Allocation View

**Grant Info**

Grant: LIHEAP 2014 Agency: OREGON HOUSING AND COMMUNITY SERVICES  
Contract # NA  
Start Date: 10-01-2013  
End Date: 09-30-2014 Closed? N

Edit Grant

Total Grant	Transferred Total	Total Remaining
\$5,000.00	\$4,150,000.00	(\$4,145,000.00)

Grant to/from APC Transfer New Allocation

**Allocations**

To Edit: Click Amount row to edit. The Grant Allocation Edit screen will appear next.

Amount	Allocation Date	Insert Date	User
\$5,000.00	11-12-2013	11-12-2013	TNU

**Grant APC Transfers**

**Figure 7-12A:** Grant Allocation View Screen – Grant to/from APC Transfer screen.

To allocate to the ‘Parent’ APC, click the button labeled ‘Grant to/from APC Transfer’.

The ‘Move Grant APC’ screen will appear. In the ‘Move Grant/APC’ section, enter the following:

- Select the appropriate APC, using the drop-down menu
- Enter the funding amount that will be moved
- Enter the date
- Select the appropriate ‘Transfer Type’

Click on ‘Move’ button to complete the transfer (*reference Figure 7-12B*).

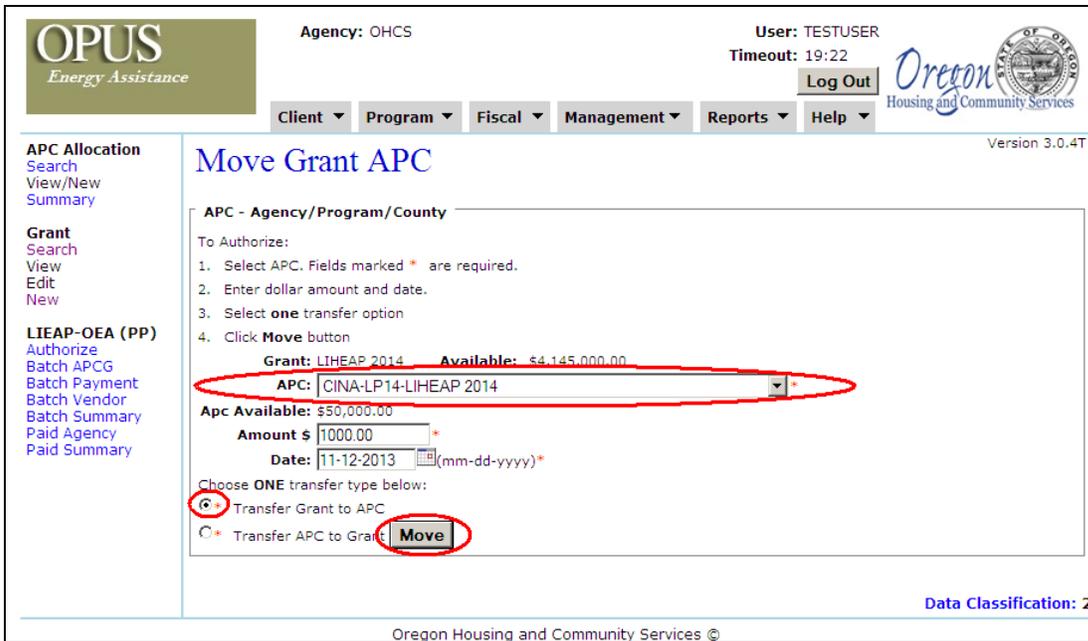


Figure 7-12B: Move Grant APC Screen - Grant to/from APC Transfer.

The ‘Grant Allocation View New’ screen will appear . Transfers should be reviewed and verified and can be done using the APC Allocation View screen.

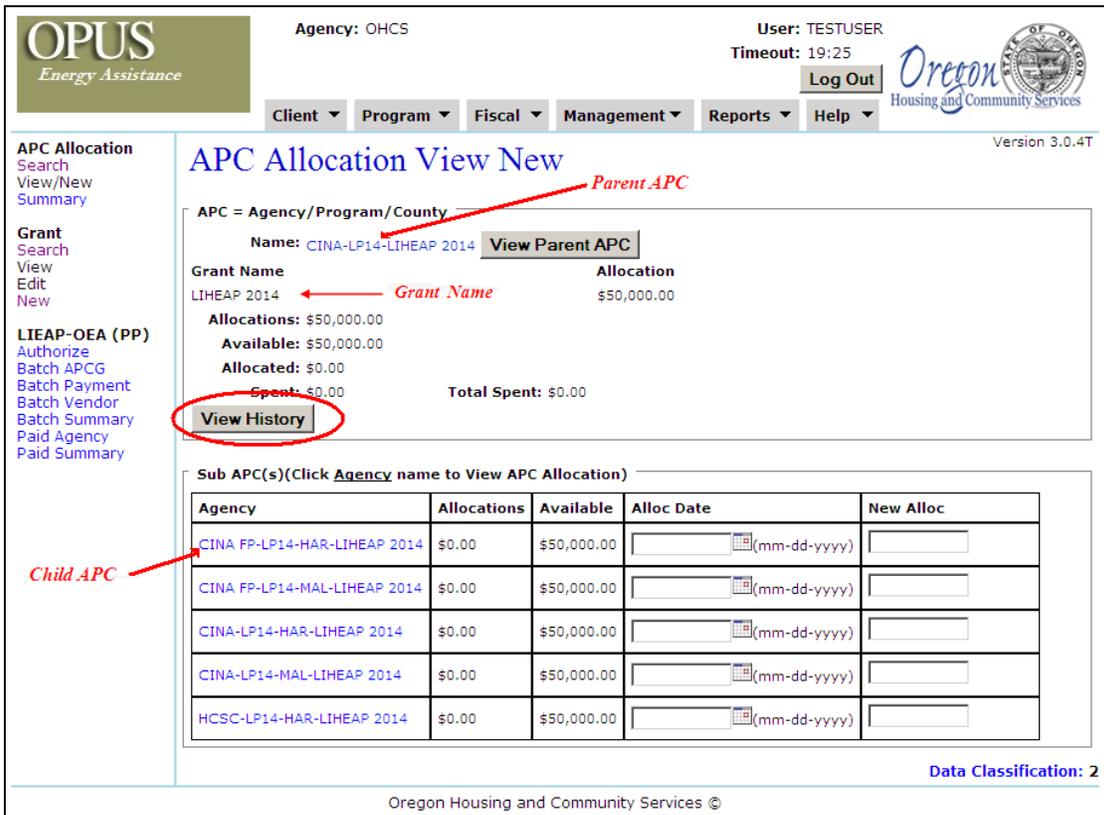


Figure 7-12C: APC Allocation View New ‘Child’ Screen.

On the ‘APC Allocation View New’ screen, above the “Grant Name” the ‘Parent’ APC is displayed showing the allocation that was just completed. If the initial APC family was built correctly, the following information: the Parent APC listed at top: CINA-LP14-LIHEAP 2014 (no county), and it’s associated ‘Child(s)’ APC: CINA-LP14-MAL-LIHEAP 2014 and APC: HCSC-LP14-HAR-LIHEAP 2014 are listed. To complete an APC moves, enter the ‘Allocation Date’, the ‘New Allocation Amount’, and click the ‘S’ (Save) button.

Click on ‘View History’ and the ‘APC Allocation History View’ screen will appear. The history view screen is used for historical purposes (*reference Figure 7-13*).

The screenshot shows the 'APC Allocation History View' screen in the OPUS Energy Assistance system. The header includes the OPUS logo, Agency: OHCS, User: TESTUSER, Timeout: 19:58, and a Log Out button. There are navigation tabs for Client, Program, Fiscal, Management, Reports, and Help. The main content area shows the title 'APC Allocation History View' and the APC Name: CINA-LP14-LIHEAP 2014. Below this is a table titled 'Allocation History' with the following data:

Amount	Alloc. Date	APC	User Initials	Insert Date/TIME
\$9,999.99	11-12-2013	HCSC-LP14-HAR-LIHEAP 2014	TNU	11-12-2013 04:00 PM
\$10,000.00	11-12-2013	CINA-LP14-MAL-LIHEAP 2014	TNU	11-12-2013 03:59 PM

The screen also features a left-hand navigation menu with options for APC Allocation, Grant, and LIEAP-OEA (PP). The footer includes 'Oregon Housing and Community Services ©' and 'Data Classification: 2'.

**Figure 7-13:** APC Allocation History View Screen

Click on ‘View Parent APC’ and the ‘APC Allocation View New’ screen will appear. Select the appropriate ‘Parent APC’ by clicking on the Sub APC Agency link (*reference Figure 7-14*).

OPUS Energy Assistance Agency: OHCS User: TESTUSER Timeout: 19:54 Log Out Oregon Housing and Community Services Version 3.0.4T

Client Program Fiscal Management Reports Help

**APC Allocation View New**

APC = Agency/Program/County  
 Name: CINA-LP14-LIHEAP 2014 **View Parent APC**

Grant Name: LIHEAP 2014 Allocation: \$50,000.00  
 Allocations: \$50,000.00 Available: \$50,000.00 Allocated: \$0.00 Spent: \$0.00 Total Spent: \$0.00

**View History**

Sub APC(s)(Click Agency name to View APC Allocation)

Agency	Allocations	Available	Alloc Date	New Alloc
CINA FP-LP14-HAR-LIHEAP 2014	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
CINA FP-LP14-MAL-LIHEAP 2014	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
CINA-LP14-HAR-LIHEAP 2014	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
CINA-LP14-MAL-LIHEAP 2014	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
HCSC-LP14-HAR-LIHEAP 2014	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-14: APC Allocation View New Screen – View History

The ‘APC Allocation View New’ screen will appear. In the upper portion of the screen is the information on the ‘Parent APC’. This view screen is used for historical purposes (*reference Figure 7-15*).

OPUS Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 15:14  
Log Out

Client Program Fiscal Management Reports Help

APC Allocation View/New Summary

Grant Search View Edit New

LIEAP-OEA (PP) Authorize Batch APCG Batch Payment Batch Vendor Batch Summary Paid Agency Paid Summary

### APC Allocation View New

APC = Agency/Program/County

Name: [CINA-LP14-LIHEAP 2014](#) [View Parent APC](#)

Grant Name	Allocation
LIHEAP 2014	\$50,000.00

Allocations: \$50,000.00  
Available: \$30,000.01  
Allocated: \$19,999.99  
Spent: \$0.00  
Total Spent: \$0.00

[View History](#)

Sub APC(s)(Click Agency name to View APC Allocation)

Agency	Allocations	Available	Alloc Date	New Alloc
<a href="#">CINA FP-LP14-HAR-LIHEAP 2014</a>	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
<a href="#">CINA FP-LP14-MAL-LIHEAP 2014</a>	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
<a href="#">CINA-LP14-HAR-LIHEAP 2014</a>	\$0.00	\$50,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
<a href="#">CINA-LP14-MAL-LIHEAP 2014</a>	\$10,000.00	\$60,000.00	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>
<a href="#">HCSC-LP14-HAR-LIHEAP 2014</a>	\$9,999.99	\$59,999.99	<input type="text"/> (mm-dd-yyyy)	<input type="text"/>

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-15: APC Allocation View New Screen – View Parent APC

## Program Funds Available for Payment Assistance

Once the Grant and APC tree structure is completed and grant funds allocated down to the Child APC level, the funds will be able to be used on the ‘OPUS New Payment’ screen for client payment assistance.

After an intake worker has processed a household through the OPUS system, the intake worker will be able to select the Child-APC from a drop down menu on the ‘New Payment’ screen.

### **Reference Section 2; Client Intake New.**

Steps have been completed for creating a Local Program.