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*).

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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 Assistanc	Agency: OHCS		User Timeout	: TESTUSER : 19:59 Log Out	Oregon ()						
	Client ▼ Program ▼ Fig	scal 🔻 Man	agement 🔻 🛛 Reports 🔻	Help 🔻 "	ousing and community services						
Search Agency APC Program Vendor User Kit Agency New View Edit	Agency Search Enter Search Parameters (results lim Agency Name: Abbreviation: OHCS Address: Phone: Searce	ited to 500 ro	ws) —————		Version 3.0.4T						
	About Results: Click Agency Name to View Agency screen If no results, you can create a Add Agency										
	Search Results										
	Agency Name										
•	OREGON HOUSING AND COMMUNITY SERV.	ICES THCS	725 SUMMER ST NE STE B SALEM, OR 97301-4246	503-986-2000							
					Data Classification: 1						
	Oregon Housi	ing and Comm	unity Services ©								

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 Client ▼ Program ▼ Fiscal ▼ Management ▼	User: TESTUSER Timeout: 19:55 Log Out Housing and Community Services
Search Agency APC Program Vendor User Kit Agency New View Edit	Agency View Agency Info Name: OREGON HOUSING AND COMMUNITY SERVICES Tax Id: 5452323 Abbreviati Subgrantee: N Mail Co Entity Type: -9-NA Stap Profile Edit Agency Contact Info Phone: (503) 986-2000 Physical Address: 725 SUMMER ST NE STE B	Version 3.0.4T S ion: OHCS ode: r #:
	SALEM, OR 97301-4246 Mailing Address: 725 SUMMER ST NE STE B SALEM, OR 97301-4246	Data Classification 1
	Oregon Housing and Community Servic	ces ©

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

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

OPUS Energy Assistanc	Agen e	.y: OHCS			User: TESTUSE Timeout: 19:56	Orecon							
Search Agency APC Program Vendor	Agency Search Version 3.0												
User Kit Agency New View Edit	Agency Name: Abbreviation: KDF Address: Phone: Search												
	About Results: Click <u>Agency Name</u> to If no results, you can Search Results	View Agency - createra Add A	Agency .										
	Agency Name Ab No matches	orev Address	Phone										
						Data Classification: 1							
		Oregon H	lousing and	Community Service	s©								

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'.

$\left(2 \right)$

OPUS Energy Assistance	e	Agency	r: OHCS			Us Timeo	er: TESTUSER ut: 19:56 Log Out		
		Client 🔻	Program 🔻	Fiscal 🔻	Management 🔻	Reports	Help Help		
Search Client	Mess	ane of	the Day		Agency		Version 3.0.4T		
	IVICSS	sage of	the Day		APC				
Change Password?				\sim	Program				
Edit Your User Account	WELCOME	! To start OPL	JS - Click Searcl	n Client	User				
	System Is	ssue? Contac	t us @ opushelp	@hcs.state.or.	Kit	53-5511	1, option #6.		
	Daily N	lotices		Progra	Vendor		OPUS Help		
					Qualifying Tables	•			
	09-17-20	13 - THIS IS	OPUS TEST.	09-18-20	Go To	▶lable	E-mail: opushelp@hcs.state.or.us		
	TESTING	G ONLY. USE	OPUS	for Trai	ming! Please contact	Opus			

Figure 7-2: Management – Program Dropdown

OPUS Energy Assistanc	Agency	: TEST			User Timeout	TESTUSER 19:56 Log Out	Oreton Housing and Community Services
Search Agency APC Program Vendor User Kit Program New View Edit	Program Paramete Program Nake: BA Code: Start Date End Date		W e.o LIEAI (mm-dd-yyyr arch	P 2001 y) y)	Reports V	нер	Version 3.0.4T
(Click <u>Program Code or</u> If results don't list prog Program Name No matches	Sear Program Name t ram you're seard Code	ch Results to view Progra ching for, you Start Dat	am Edit Screen. can create a N e Enc	ew Program		Data Classification: 1
		Oregon Ho	ousing and C	ommunity Servi	ces ©		

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

OPUS Energy Assistanc	e	Agency	Y: TEST			User Timeout	TESTUSER 18:16 Log Out	Oregon ()		
		Client 🔻	Program 🔻	Fiscal 🔻	Managemen	t▼ Reports ▼	Help 🔻	Housing and community oct tees		
Search Agency APC Program Vendor User Kit Program New View Edit	Program Search View Program Name: e.g. LIEAP 2001 Code: BCT14 Start Date End Date End Date Search									
			Sea							
	Click <u>Program Code or Program Name</u> to view Program Edit Screen. If results don't list program you're searching for, you can create a New Program									
	Program N	lame	Code	Start D	ate	End Date				
	No matche	is						Data Classification: 1		
			Oregon H	ousing and	Community Se	rvices ©				

Figure 7-2B: Program Search Screen by Code with "No Matches".

OPUS Energy Assistance	e	Agency	: TEST			Us Timeo	er: TESTUSE ut: 17:13 Log Out	R Orecon			
		Client 🔻	Program 🔻	Fiscal 🔻	Manageme	nt 🔻 Reports	▼ Help ▼	nousing and community octorees			
Search Agency APC Program Vendor User Kit Program New View Edit	Program Search View Program Name: BASIC TRAINING e.g. LIEAP 2001 Code: Start Date (mm-dd-yyyy) End Date Search										
	Click <u>Proq</u> If results o										
	Program N	lame	Code	Start D	ate	End Date					
	No matche										
			0					Data Classification: 1			

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.

OPUS Energy Assistance	Agency: TEST e Client ▼ Program ▼ Fiscal ▼ Manageme	User: TESTUSER Timeout: 19:55 Log Out Housing an Community Services
Search Agency APC Program Vendor User Kit Program New View Edit	Program New Program Name: Code: * (e.g. LP02) Start Date: Shared: Income Qualification Type: SSN Verify: Save Age Verify:	Version 3.0.4T
		Data Classification: 1
	Oregon Housing and Community S	ervices ©

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	Agency: TEST							User: TESTUSER Timeout: 19:59 Log Out					
		Client 🔻	Pro	gram	▼ Fisca	al 🔻 M	lanagem	ent 🔻	Reports 🔻	Help 🔻	Housing and Community Services			
Search Agency APC	P	Program View Version 3.0.4												
Program Vendor	[PI	Program Info												
Kit		Name	BA:	SIC TR	AINING		Cod	le: BC	T14	Type:	LOCAL			
Program		Agency	/: TES	ST	5	Shared?	N							
New		Start Date	a: 10-	01-201	13	End	Date: 09	-30-20	14					
Edit	_ Ir	Income Qualifications												
	In	come Qualificatio	1: No											
		SSN Verify	/: N		Age Ve	rify: N								
		Edi	t Pro	gram										
	Pa	yment Variables												
		Type(click to edit)	Min	Max	Total Max	Total #	LIHEAP	Tier						
		Crisis	1	500	500	1	N	4						
		Special	1	100	1000	99	Ν	4						
		Standard-Reg	50	50	99999	12	Ν	4						
		Check All Del	ete	Ado	đ									
											Data Classification: 1			
				Orego	n Housing	and Co	mmunity	Servic	es ©					

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 Assistanc	e	Agency	: TEST			User: Timeout:	TESTUSER 19:26 Log Out	Oregon Housing and Community Services
Search Agency APC Program Vsendor User Kit Program New View Edit	Payment Use Lihe Payment Payment	Client V ent Variables Payment T ap Calculati Payment Payment ment Total ent Total C San	Program V triables Info ype: Crisis on?: Tier: 4 * Min: 1* Max: 500 Max: 500 punt: 1*	Fiscal V New	Management v	Reports v	Help 🔻	Housing and Community Services Version 3.0.4T
			Oregon H	ousing and	Community Service	s ©		Data Classification: 1

Figure 7-5A: One Time Payment

OPUS Energy Assistance	e	Agency	: TEST			User: Timeout:	TESTUSER 19:33 Log Out	Orecon (
		Client 🔻	Program 🔻	Fiscal 🔻	Management 🔻	Reports 🔻	Help 🔻	nousing we community constant
Search Agency APC Program Vendor User Kit Program New View Edit	Paymen Use Lihe Payn Paym	ent Variables Payment T ap Calculati Payment Payment ment Total ent Total Co Sar	Info Info Vpe: Standard ion?: Tier: 4 • Min: 50 • Max: 50 • Max: 99999 punt: 12 • re	New I-Reg v *				Version 3.0.4T
			Oregon H	lousing and (Community Service	es ©		

Figure 7-5B: Reoccurring Payment

OPUS Energy Assistanc	Ager	cy: TEST			User: Timeout:	TESTUSER 19:38 Log Out	Orecon Housing and Community Services
Search Agency APC Program Vendor User Kit Program New View Edit	Client Payment Variabi Paymen Use Liheap Calcu Payme Payment Tota Payment Total	Ariables s Info Type: Special ation?: Tier: 4 * th Min: 1* th Max: 1000* ation Count: 99* ave	riscal • New	Management V	Reports V	Help ¥	Version 3.0.4T
		Oregon H	lousing and	Community Service	s ©		

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.

	100400
Program	APO
County	-

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.

OPUS Energy Assistance		Agency: TEST			User: TESTUSER Timeout: 10:33 Log Out Housing and Community			Orecon	
		Client 🔻	Program 🔻	Fiscal 🔻	Managem	ent 🔻	Reports 🔻	Help 🔻	nousing and community services
Search	Prom	ram Vi	-11 /	Search	•	APC Allo	ocation.		Version 3.0.4T
Agency APC	I TOg		C VV	Authorize		Grant		\supset	
Program Vendor	Program	n Info ——		Batch	Þ				
User Kit		Name	BASIC TRAIN	Paid	•	le: BCT1	4	Type:	LOCAL
The second se		Agency	: TEST	Share	d? N				

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.

OPUS Energy Assistance	Agency: TEST User: TESTUSER Timeout: 19:49 Log Out
	Client ▼ Program ▼ Fiscal ▼ Management ▼ Reports ▼ Help ▼
APC Allocation Search View/New Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch APCG	Grant Allocation Search Enter Search Parameters Grant Name QONOS contract # Start Date (mm-dd-yyyy) End Date (mm-dd-yyyy) Search
Batch Payment Batch Vendor Batch Summary Paid Agency	About Results: Click <u>Grant Name</u> to View Grant screen If no results, you can create a New Grant .
Paid Summary	Search Results
	Grant Name Contract# Agency Start End Updated Initials Closed
	No matches
	Data Classification: 1
	Oregon Housing and Community Services ©

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 Assistanc	Ag	jency: TEST			User: Timeout:	TESTUSER 19:58 Log Out	Orecon Housing and Community Services
APC Allocation Search View/New Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch APCG Batch Payment Batch Vendor Batch Summary Paid Summary	Grant Ne	t v Program v	d with * are	Management ▼ required.))*)* Closed?	Keports V	Help V	Version 3.0.4T
		Oregon H	lousing and	Community Service	s ©		

Figure 7-6C: Grant New Screen.

OPUS Energy Assistance	Agency: TEST					User: TESTUSER Timeout: 19:32 Log Out			
		Client 🔻	Program 🔻	Fiscal 🔻	Managen	ient 🔻	Reports 🔻	Help 🔻	rousing and community services
APC Allocation Search View/New Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch APCG Batch Payment Batch Vendor Batch Vendor Batch Summary Paid Agency Paid Summary	Grant Inf Grant Inf Contra Start D End D Edit Gran Total Gran Total Gran Allocation To Edit: C Amount No Allocatic Grant APC Amount	Alloc fo rant: QONC (ct # NA Date: 10-01 Date: 09-30 nt from APC from APC from APC from APC from APC	ation Vie Agency -2013 -2014 Close Transferred Transfer row to edit. The Nilocation Date	EW : TEST :ed? N Total Grant Alloc	\$0.00 ation Edit : [nst	Total R screen wi	Remaining New / ill appear next.	\$0.00 Allocation User	Version 3.0.4T
	No Transfe	rs							
									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 <u>not</u> 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 <u>*will not*</u> 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*).

OPUS Energy Assistance	Agency:	TEST			User: Timeout:	TESTUSER 16:05 Log Out	Oregon (
	Client 🔻	Program 🔻 🛛 Fiscal	• Manage	ment 🔻	Reports 🔻	Help 🔻	Housing and Community Services
APC Allocation Search View/New Summary	Grant Alloca	tion View	Agency APC Program				Version 3.0.4T
Grant Search	Grant: QONOS	Agency: TEST	User				
View Edit	Contract # NA		Kit				
New	Start Date: 10-01-2 End Date: 09-30-2	013 014 Closed? N	Vendor				
LIEAP-OEA (PP)			Qualifyir	ng Tables	•		
Authorize Batch APCG	Edit Grant		Go To		•		1
Batch Payment	Total Grant	Transferred Total		Total Re	emaining		

Figure 7-7: Management - APC Dropdown

OPUS Energy Assistance	Agence e	y: TEST	e'		User: Timeout:	TESTUSER 19:57 Log Out	Orecon Housing and Community Services
Search Agency APC Program Vendor User Kit APC New View Edit	Client APC Searce Enter Search Para Agency TES Program BCT County Grant Start Date 10-0 End Date 09-30	Program	mm-dd-yyyy mm-dd-yyyy	Management	Reports ¥	Help ¥	Version 3.0.4T
<	About Results: Click Agency If no results, you can Search Results Agency Program Cite No matches	APC screen create New /	APC	i Date			Data Classification: 1

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' sction. The 'APC New' screen will appear (*reference Figure 7-7B*).

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

OPUS Energy Assistanc	Agency: TEST e Client ▼ Program ▼ Fiscal ▼ Manager	User: TESTUSER Timeout: 19:16 Log Out Housing and Community Services
Search Agency APC Program Vendor User Kit APC New View Edit	APC New Aper = Agency/Program/County Agency Name: TEST * Sub Agency to: * County: * Program: BCT14 * Grant: QONOS-TEST * Start Date: 10-01-2013 **(mm-dd-yyyy)* End Date: 09-30-2014 **(mm-dd-yyyy)* Save	Version 3.0.4T ve Blank for Parent APC Data Classification: 1
	Oregon Housing and Community	/ Services ©

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.

OPUS Energy Assistance	e	Agency	r: TEST	Ficed -	Managament	User: Timeout:	TESTUSER 19:52 Log Out	Orecon Housing and Community Services
Search Agency APC Program Vendor User Kit APC New View Edit	APC = Agen APC Start Date Sub APC to Sub APC's	View Ney/Program TES Parent	Program V (Count) ST-BCT14-QON 01 2010 Progr	am (End Date 09-	30-2014		Edit APC Delete APC
								Data Classification: 1
			Oregon H	ousing and	Community Service	es ©		

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*).

OPUS Energy Assistance	e Client ▼ Program ▼ Fiscal ▼ Management ▼	User: TESTUSER Timeout: 18:49 Log Out Reports V Help V
Search Agency APC Program Vendor User Kit APC New View Edit	APC New APC = Agency/Program/County Agency Name: OHCS ** Sub Agency to: OHCS-LP14-LIHEAP 2014 County: MARION C Program: LP14 * Grant: LIHEAP 2014-OHCS Start Date: 10-01-2013 (mm-dd-yyyy)* End Date: 09-30-2014 (mm-dd-yyyy)* Save	Version 3.0.4T
	Oregon Housing and Community Servic	es ©

Figure 7-7D: APC New – 'Child' screen.



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*).

OPUS Energy Assistance	e	Agency	TEST				User: Timeout:	TESTUSER 16:05 Log Out	Orecon Housing and Community Services
		Client •	Program 🔻	Fiscal 🔻	Managen	ient 🔻	Reports 🔻	Help 🔻	
APC Allocation Search View/New Summary Grant	Grant	fo	ation Vi	ew C	Agency APC Program				Version 3.0.4T
Search View	Contr	act # NA	S Agency	. 1231	USEI		-		
Edit	Start	Date: 10-01-	2013		Kit		_		
New	End	Date: 09-30-	2014 Clos	sed? N	Vendor				
LIEAP-OEA (PP)		_			Qualifying	Tables	•		
Authorize Batch APCG	Edit Gra	nt			Go To		•		
Batch Payment	Total Gra	nt	Transferred	d Total		готаг ке	maining		

Figure 7-8: Management - APC Search

OPUS Energy Assistance	•	Agency	: OHCS			User: Timeout:	Orecon Housing and Community Services	
Search Agency APC Program Vendor User Kit APC New View Edit	APC	Client Client	Program V	Fiscal V mm-dd-yyyy mm-dd-yyyy arch	Management v	Reports V	Help V	Housing and Community Services Version 3.0,4T
								Data Classification: 1
			Oregon H	ousing and	Community Service	s ©		

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*).

OPUS Energy Assistance		Agency	OHCS				User: TESTUSER Timeout: 19:53			
		Client 🔻	Program	▼ Fiscal ▼	Manager	nent 🔻 🛛 R	Reports • Help •			
Search Agency APC Program Vendor User Kit APC New View Edit	APC Enter Se Pro Co Start End	Search Param ency MWVG gram LP14 ounty Grant Date Date Date	eters	(mm-dd-yy (mm-dd-yy Search	vy)	Version 3.0.4T				
	About Re Click Ager If no resul Search R Agency MWVCAA MWVCAA	sults: ICY to View A ts, you can or esults Program LIHEAP 2014 LIHEAP 2014 LIHEAP 2014	PC screen eate a Ne County MARION POLK	WAPC.	Parent APC Start Date 09-01-2013 09-01-2013 09-01-2013	No County End Date 09-30-2014 09-30-2014 09-30-2014	Child APC shown with County			
							Data Classification: 1			
			Orego	n Housing an	d Community	y Services ©	Þ			
					~					

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'.

OPUS Energy Assistance		Agency: OHCS					User: TESTUSER Timeout: 11:10 Log Out				
		Client 🔻	Program 🔻	Fiscal 🔻	Managen	ient 🔻	Reports 💌	Help 🔻	Housing and community services		
Search	APC	Search	`	Search	•	APC AI	ocation		Version 3.0.4T		
APC		Scarei	1	Authorize		Grant		D			
Program Vendor	Enter S	earch Paran	neters	Batch	+						
User Kit	A	gency MWV	CAA 🔻	Paid	+						
	Pro	ogram LP14		•							

Figure 7-9: Fiscal – Search - Grant Dropdown

OPUS Energy Assistance	Agenc	User: TESTUSER Timeout: 19:54 Log Out										
	Client 🔻	Program	Fiscal 🔻	Managemer	nt 🔻 🛛 Repo	rts 🔻 Helj	•	aonig und t	ounium y <u>ou</u> rices			
APC Allocation Search View/New Summary	Grant Allocation Search Version 3.0.4T Enter Search Parameters											
Grant	Grant Name LIHE	ant Name LIHEAP 2014										
View	Contract #											
New	Start Date		(mm-dd-yyyy)									
LIEAP-OEA (PP) Authorize Batch APCG	End Date											
Batch Payment Batch Vendor Batch Summary Paid Agency	About Results: Click <u>Grant Name</u> to V If no results, you can	riew Grant s	screen le w Grant .									
Paid Summary	Search Results											
	Grant Name	Contract#	Agency	Start	End	Updated	Initials	Closed				
	LIHEAP 2014	NA	OREGON HOUSING AND COMMUNITY SERVICES	10-01-2013	09-30-2014	09-16-2013	BLH	N				
	LIHEAP 2014 KTRIBE	NA	OREGON HOUSING AND COMMUNITY SERVICES	10-01-2013	09-30-2014	09-16-2013	BLH	N				
								Data	Classification: 1			
Oregon Housing and Community Services ©												
	C	· a	1.0									

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	e	Agency:	OHCS				User: Timeout:	TESTU 15:51 Log (Dut 1	Drecon		
	CI	ient 🔻	Program 🔻	Fiscal 🔻	Managen	nent 🔻 🛛 I	Reports 🔻	Help	-	asing and community bervices		
APC Allocation Search View/New Summary	Grant A	Alloca	tion Vi	ew						Version 3.0.4T		
Grant	Grant Info											
Search View	Gran	Contract # NA										
Edit	Start Date	Start Date: 10-01-2013										
New	End Date											
LIEAP-OEA (PP) Authorize Batch APCG) Edit Grant											
Batch Payment Batch Vendor	Total Grant		Transferre	d Total		Total Rer	naining					
Batch Summary		\$0.00	<u> </u>	\$4,	150,000.00		(\$4,1	50,000	0.00)			
Paid Agency Paid Summary	Grant to/from	m APC T	ransfer)			New A	lloca	tion			
	Allocations											
	To Edit: Click	Amount ro	ow to edit. The	Grant Alloc	ation Edit	screen will a	appear next.					
	Amount	All	ocation Date		Ins	ert Date		User				
	No Allocations											
	Grant APC Tr	ansters						_				
	Amount	APC NAM	1E		M	ove Date	Insert Da	ite	User			
	\$50,000.00	CINA FP-	LP14-MAL-LIH	EAP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	KLCAS-L	P14-KLA-LIHEA	AP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	CAPECO-	-LP14-MOR-LIF	IEAP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	CAPECO-	-LP14-GIL-LIHE	AP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	CAPECO-	-LP14-UMA-LIH	EAP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	CAPECO-	-LP14-WHE-LIF	IEAP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	NIMPACT	-LP14-LIHEAP	2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	NIMPACT	-LP14-JEF-LIH	EAP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00	NIMPACT	-LP14-DES-LI	HEAP 2014	09	9-16-2013	09-16-201	3	BLH			
	\$50,000.00 NIMPACT-LP14-CRO-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 subagencies '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	PUS argy Assistance						User: TESTUSER Timeout: 15:51 Log Out			Oregon ()
	CI	ient 🔻	Program 🔻	Fiscal 🔻	Manager	nent 🔻	Reports -	Hel	р 🔻 ^{Но}	ousing and Community Services
APC Allocation Search View/New	Grant A	lloca	tion Vi	ew						Version 3.0.4T
Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize	Grant Info Gran Contract Start Date End Date									
Batch APCG Batch Payment	Total Grant		Transferred	Total		Total Re	emaining			
Batch Vendor Batch Summary		\$0.00		\$4,	150,000.00		(\$4	4.150.00	0.00)	
Paid Agency Paid Summary	Grant to/from	m APC T	ransfer			1	New	/ Alloca	ation	>
	Allocations									
	To Edit: Click	Amount re	ow to edit. The	Grant Alloc	ation Edit	screen will	appear next	t.		
	Amount	All	ocation Date		Ins	ert Date		Use	r	
	No Allocations									
	Grant APC Tr	ansfers								
	Amount	APC NAM	1E		м	ove Date	Insert	Date	User	
	\$50,000.00	CINA FP-	LP14-MAL-LIHE	AP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	KLCAS-L	P14-KLA-LIHEA	P 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	CAPECO-	LP14-MOR-LIH	EAP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	CAPECO-	LP14-GIL-LIHE	AP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	CAPECO-	LP14-UMA-LIH	EAP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	CAPECO-	LP14-WHE-LIH	EAP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	NIMPACT	-LP14-LIHEAP	2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	NIMPACT		EAP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	NIMPACT	-LP14-CRO-LI	HEAP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	MCCAC-I	P14-LTHEAP 20	014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	MCCAC-L	P14-HOO-LIHE	AP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	MCCAC-L	P14-SHE-LIHE	AP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	MCCAC-L	P14-WAS-LIHE	AP 2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	CSC-LP1	4-LIHEAP 2014		0	9-16-2013	09-16-2	013	BLH	1
	\$50,000.00	CSC-LP1	4-LIN-LIHEAP 2	2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	CSC-LP1	4-LNC-LIHEAP	2014	0	9-16-2013	09-16-2	013	BLH	
	\$50,000.00	CSC-LP1	4-BEN-LIHEAP	2014	0	9-16-2013	09-16-2	013	BLH	

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

2. 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'.

OPUS Energy Assistance	,	Agency	CHCS			User: Timeout:	TESTUSER 19:39 Log Out	Orecon ()
APC Allocation Search	Grant	Alloc	ation Ne	W	Management *	Reports •	нер 🔻	Version 3.0.4T
View/New Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch Payment Batch Payment Batch Vendor Batch Vendor Batch Summary Paid Agency Paid Summary	Fields m Amount Save A	arked with G (Select + c Allocation I Ilocation	an * are requ rant: LIHEAP 20 or -): © + C- 53 Date: 11-12-201	ired.	* nm-dd-yyyy)*			Data Classification: 2
			Oregon H	ousing and	Community Service	25 ©		Data Classification: 2

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*).

OPUS Energy Assistance	e Ag	ency: OHCS				User: TESTUSER Timeout: 19:49 Log Out		
	Clien	t 🔻 Program	▼ Fiscal ▼	Managem	ient 🔻	Reports 🔻	Help 🔻	nousing and community services
APC Allocation Search View/New Summary	Grant All	Version 3.0.4T						
Grant Search View Edit New LIEAP-OEA (PP)	Grant Into Grant: L Contract # N Start Date: 1 End Date: 0	IHEAP 2014 IA 0-01-2013 9-30-2014	Agency: OREG Closed? N	AND CO	MMUNITY SERV	/ICES		
Batch APCG	Edit Grant	Transfo	wod Total		Total B	ompining]	
Batch Vendor	\$5.5	55.55	\$4	¢4 150 000 00			44,444,45)	
Paid Agency Paid Summary	Grant to/from A	PC Transfer				New A	llocation	
	Allocations							
	To Edit: Click Am							
	Amount	ount Allocation Date			Insert Date User		User	
	\$5,555	\$5,555.55 11-12-2013 11-1				2-2013 TNU		

Figure 7-10B: Grant Allocation View Screen

The 'Amount' is a "link" indicated in <u>blue and underlined</u> (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'.

OPUS Energy Assistance	e	Agency	: OHCS			User: Timeout:	TESTUSER 18:58 Log Out	Orecon			
		Client 🔻	Program 🔻	Fiscal 🔻	Management 🔻	Reports 🔻	Help 🔻	nousing and community services			
APC Allocation Search View/New Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch APCG Batch APCG Batch Vendor Batch Vendor Batch Summary Paid Agency Paid Summary	Grant Fields m Amount Save C	Alloc arked with G (Select + c Allocation I hanges	ation Ed an * are requ rant: LIHEAP 20 or -): 5000.00 Date: 11-12-201	ired 14 3(r	δ+ C. nm-dd-yyyy)*			Version 3.0.4T			
								Data Classification: 2			
			Oregon H	ousing and	Community Service	s ©					

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.

OPUS Energy Assistance	Agency: OHCS	User: TESTUSER Timeout: 19:57 Log Out Housing and Community Services
APC Allocation Search View/New Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch APCG Batch APCG Batch Payment Batch Vendor Batch Summary Paid Agency Paid Summary	Client V Program V Fiscal V Management V Grant Edit Grant Information (Fields marked with * are required.) Name: LIHEAP 2014 * Contract # NA * Start Date 10-01-2013 (mm-dd-yyyy)* End Date 09-30-2014 (mm-dd-yyyy)* Closed? Agency OHCS V *	Reports Help Version 3.0.4T
	Oregon Housing and Community Servic	ces ©

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.

OPUS Energy Assistance	Agency	: OHCS			User: Timeout:	TESTUSER 19:56 Log Out	Oregon ()	
	Client 🔻	Program 🔻	Fiscal 🔻	Managem	ent 👻 Reports 💌	Help 🔻	using community <u>cer</u> sites	
APC Allocation Search View/New Summary	Grant Alloc	ation Vi	ew				Version 3.0.4T	
Grant Search View Edit New LIEAP-OEA (PP)	Grant: LIHEA Contract # NA Start Date: 10-01- End Date: 09-30-							
Batch APCG	Edit Grant		1 1					
Batch Vendor	fotal Grant	Transferred	d lotal	50,000,00	lotal Remaining	(\$4.145.000.00)		
Paid Agency Paid Summary	Grant to/from APC	Transfer		50,000.00	New	Allocation		
	Allocations]	
	To Edit: Click Amount	row to edit. The	Grant Alloca	tion Edit s	creen will appear next.			
	Amount	Allocation Dat	te	Ins	ert Date	User		
	\$5,000.00	11-12-2013		11-	12-2013	TNU		
	Grant APC Transfers]						

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	Agene	Y: OHCS				User: Timeout:	TESTUSE 14:39 Log Out	Busing and Community Services			
	Client 🔻	Program 🔻	Fiscal 🔻	Managen	ent▼ Re	eports 🔻	Help 🔻				
APC Allocation Search View/New Summary Grant Search View Edit New LIEAP-OEA (PP)	Grant Alloo Grant: LIHE Contract # NA Start Date: 10-0 End Date: 09-3	AP 2014 Ag 1-2013 D-2014 Clos	IMUNITY SERVICES								
Batch APCG Batch Payment	Total Grant Transferred Total Total					Remaining					
Batch Vendor Batch Summary	\$5,000.	\$4,1		(\$4,145,000.00)							
Paid Agency Paid Summary	Grant to/from APC Transfer New Allocation										
	Allocations										
	To Edit: Click Amoun	To Edit: Click Amount row to edit. The Grant Allocation Edit screen will appear next.									
	Amount Allocation Date			Ins	Insert Date User						
	\$5,000.00	11-12-2013		11-	12-2013						
	Grant ADC 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.

OPUS Energy Assistance	Agency: OHCS Client ▼ Program	• ▼ Fiscal	▼ Manage	User: TESTU: Timeout: 19:25 Log O ement ▼ Reports ▼ Help	Housing and Community Services					
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 Agency	Version APC Allocation View New Parent APC APC = Agency/Program/County Name: CINA-LP14-LIHEAP 2014 View Parent APC Grant Name Grant Name Grant Name LIHEAP 2014 Grant Name Available: \$50,000.00 Allocations: \$50,000.00 Available: \$50,000.00 Spent: \$0.00 Total Spent: \$0.00									
	Sub APC(s)(Click <u>Agency</u> name	e to View AP	C Allocation)	Now Allow					
	Agency	\$0.00	\$50,000,00	Alloc Date						
Child APC	CINA FP-LP14-MAL-LIHEAP 2014	\$0.00	\$50,000.00	(mm-dd-yyyy)						
	CINA-LP14-HAR-LIHEAP 2014	\$0.00	\$50,000.00	(mm-dd-yyyy)						
	CINA-LP14-MAL-LIHEAP 2014	\$0.00	\$50,000.00	(mm-dd-yyyy)						
	HCSC-LP14-HAR-LIHEAP 2014	\$0.00	\$50,000.00	(mm-dd-yyyy)						
	Data Classification: 2									

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*).

OPUS Energy Assistance	e	Agency: OHCS				User: Timeout:	TESTUSER 19:58 Log Out	Orecon ()					
		Client 🔻 P	rogram 🔻 🛛 Fiscal	▼ Man	agement 🔻	Reports 🔻	Help 🔻	Housing and Community Services					
APC Allocation Search View/New	APC	Allocati	on History			Version 3.0.4T							
Summary Grant	APC: Agency Name: CINA	APC: Agency/Program/County Name: CINA-LP14-LIHEAP 2014											
Search View	Amount	Alloc. Date	APC		User Initials	Insert Date	e/TIME						
Edit New	\$9,999.99	11-12-2013	HCSC-LP14-HAR-LIHE	AP 2014	TNU	11-12-2013 0	04:00 PM						
LIEAP-OEA (PP)	\$10,000.00	11-12-2013	CINA-LP14-MAL-LIHE	AP 2014	TNU	11-12-2013 0	3:59 PM						
LLEAP-OEA (PP) Authorize Batch APCG Batch Payment Batch Vendor Batch Summary Paid Agency Paid Summary													
								Data Classification: 2					
			Oregon Housing a	nd Comm	unity Services	©							

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			
	Client 🔻	Program 🔻	Fiscal	Manage	ment 🔻	Reports 🔻 Help	-	onnunty <u>oer</u> rices
APC Allocation Search View/New Summary Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch APCG Batch Payment Batch Vendor Batch Vendor Batch Summary Paid Agency Paid Summary	APC Allocation View New Name: CINA-LP14-LIHEAP 20 4 View Parent APC Grant Name LIHEAP 2014 \$50,000.00 Allocations: \$50,000.00 Available: \$50,000.00 Allocated: \$0.00 Spent: \$0.00 Total Spent: \$0.00 View History							Version 3.0.4T
	Agency		llocations	Available	ble Alloc Date		New Alloc	
	CINA FP-LP14-HAR-LI	HEAP 2014 \$	0.00	\$50,000.00		(mm-dd-yyyy)		
	CINA FP-LP14-MAL-LI	IEAP 2014 \$	0.00	\$50,000.00		(mm-dd-yyyy)		
	CINA-LP14-HAR-LIHEAP 2014		0.00	\$50,000.00		(mm-dd-yyyy)		
	CINA-LP14-MAL-LIHEA	P 2014 \$	0.00	\$50,000.00		(mm-dd-yyyy)		
	HCSC-LP14-HAR-LIHE	AP 2014 \$	0.00	\$50,000.00		(mm-dd-yyyy)		
	L	Oregon	Housing an	d Communit	ty Service	s ©	Data	Classification: 2

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	CHCS		User: TESTUSER Timeout: 15:14 Log Out							
APC Allocation Search View/New Summary	APC Allocation View New Version 3.0.4T APC = Agency/Program/County										
Grant Search View Edit New LIEAP-OEA (PP) Authorize Batch APCG Batch Payment Batch Vendor Batch Vendor Batch Summary Paid Agency Paid Summary	Name: CINO-LOST LIHEAR 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 View History View History										
	Agency	<u>iency</u> name to	Allocations Available Alloc Da			e	New Alloc				
	CINA FP-LP14-HAR-LI	HEAP 2014 \$0.	.00	\$50,000.00		(mm-dd-yyyy)					
	CINA FP-LP14-MAL-LI	HEAP 2014 \$0.	.00	\$50,000.00		(mm-dd-yyyy)					
	CINA-LP14-HAR-LIHE	AP 2014 \$0.	.00	\$50,000.00		(mm-dd-yyyy)					
	CINA-LP14-MAL-LIHE	AP 2014 \$10	0,000.00	\$60,000.00		(mm-dd-yyyy)					
	HCSC-LP14-HAR-LIHE	AP 2014 \$9	,999.99	\$59,999.99		(mm-dd-yyyy)					
		Oregon H	lousing an	d Communit	y Services	5 ©	Data Clas	sification: 2			

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.