Section Two

Client Intake - New

New household records are created in this section. From there, a household (HH) can be enrolled in agency programs, services and household transactions.

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Energy Education	See Section 4
Kits Components	See Section 4

All SSNs throughout this manual have be covered for confidentiality purposes even though the test database was used.

Client Search

There are two types of client search screens, 'Client Search' and 'Client Search New'.

When to use each specific Search Screen

<u>Client Search</u>: Use the 'Client Search' screen to find <u>current records</u> in the OPUS database. <u>Client Search New</u>: Use the 'Client Search New' screen during a <u>client intake</u> session.

Setup:

Log in and start from 'Message of the Day' Screen.

- 1. Click the 'Client Search' link on the left nav bar or pass your cursor over 'Client' on the main menu and select 'Search' from the dropdown list. The 'Client Search' screen will appear next. (*reference figure 2-1*).
- 2. An individual search needs to be conducted for each new client and/or each client in the household. Search for clients by name or SSN/System ID (SID or SYSID) without dashes.
- 3. Click the 'Search' button.



Figure 2-1: Client Search Screen

When a search is unsuccessful, a message 'No Results Found' will display under the 'Search Results' section (*reference figure 2-2*). Repeat the search for each "new client" or "client in the household" (HH) before adding a client to a household. When a search is successful, a client's information will display in the Search Results (*reference figure 3-2*).

If a person <u>does not</u> exist in the OPUS system, a client search will indicate 'No Results Found'. The client can then be entered as a 'New Client'.

OPUS Energy Assistance		y: OHCS Program ▼	Fiscal 🔻	Management 🔻	User: TESTUSER Timeout: 19:50 Log Out Housing and Community Services					
Client Search View New Edit Residence View New Edit Household View Mail/Ph Update NCB Update Move Client to HH	Client Sear Search Parameter SSN/SYSID: First Name: KOR Last Name: SON-G When you Click in S Client's SSN = Housel Client's Name = Clien Residence Address = A maximum of 100 re	Gat least one fi	Ad Sea Advance	dress: City: Zip:	Show Res	Uni sidence Info. o	it:	(ie Apt B)		
HH to Residence Merge HH	Search Results									
Energy Education				No Results Found	đ					
View Kit Component New	SSN #	First Name		Last Name	Birth Year	Address	Unit	City		
		Oregon Ho	using and (Community Service	•s @		Data Cla	ssification: 3		
		o. egon ne	ability and	commanity bervice						

Figure 2-2: Client Search Screen - No Results Found

A search can be completed by any of the fields provided: SSN, first name, last name, physical address, system ID, city or zip. When a client has a system identification (SYSID#) different from their social security number, it might be beneficial to remove the SYSID# from the search box, and search only by the first and last name.

Advanced Search

Additionally you can access Advanced Search features by clicking on the 'Advanced Search' link (*reference figure 2-3A*). An advanced search can be completed utilizing system Identification (SYSID#), First Name, Last Name and/or Telephone Number (Ref. (*reference figure 2-3B and 2-3C*).

OPUS Energy Assistance	-	: OHCS			Timeout: 1	og Out	I REDON
	Client 🔻	Program 🔻	Fiscal 🔻	Management 🔻	Reports 🔻 🛛	Help 🔻	sing and community oct vices
Client Search View New	Client Search	ch					Version 3.0.4T
Edit	Search Parameters	(at least one f	field require	ed)			
Residence View New Edit	SSN/SYSID: First Name: KOR Last Name: SON-0	F-RYNAR	Ad	dress: City:	Show Reside	Unit: ence Info. onl	
Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH	When you Click in So Client's SSN = Househ Client's Name = Client Residence Address = F A maximum of 100 res	old Screen Screen tesidence Screer	1	rch ced Search			
Energy Education View Kit Component New							Data Classification: 3
		Orogen II		Community Convice			
		Oregon H	ousing and	Community Service	25 ©		

Figure 2-3A: Client Search Screen

Client Program • Piscal • Management • Reports • Help • Client • Program • Piscal • Management • Reports • Help • Client • Client • Program • Piscal • Management • Reports • Help • Client • Client • Program • Piscal • Management • Reports • Help • Client • Client • Program • Piscal • Management • Reports • Help • Version 3.0.4T Version 3.0.4T Search Siew • New •	OPUS Energy Assistanc		User: TESTUSER Timeout: 19:44 Log Out Housing an Community Services
Oregon Housing and Community Services ©	Search View New Edit Residence View New Edit Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH Energy Education View	Search Parameters (at least one field required) SSN/SYSID: First Name: Phone 5039990000 (Sportion of phone number, numbers When you Click in Search Results: Client's SSN = Household Screen Client's Name or Phone Number = Client Screen	Version 3.0.4T
		Oregon Housing and Community Servic	es ©

Figure 2-3B: Advanced Client Search Screen

OPUS Energy Assistance	•	Agency: O⊦ ent ▼ Pro		cal 🔻 Manag	ement 🔻	User: Timeout: Reports ▼	TESTUSER 19:57 Log Out Help ▼	Orecon Housing and Community Services
Client Search View New Edit Residence View New Edit Household View Mail/Ph Update NCB Update Move	Search Parai SSN/SYSID: First Name: Phone: When you Client's SSN = Client's Name of	meters (at) 5039990000 ck in Searcl Household S or Phone Nun	h Results:	required)	numbers o	nly, no -)		Version 3.0.4T
Client to HH HH to Residence		Searc	h Results					
Merge HH	SSN #	First Name	Last Name	Phone				
Energy Education	SWORF040365	WORF	SON-OF-MOGH	503-999-0000				
View Kit Component New								Data Classification: 3
			Oregon Housir	ng and Commur	ity Service	s ©		

Figure 2-3C: Advanced Client Search Screen – Search Results

Note: 'Search Results' are displayed for the first 100 records randomly matching the criteria you enter in a given 'search'. A list resulting of up to 100 individual result records are generated randomly. If specific search criteria entered will result in a more than 100 matches, utilize a redefined search result and narrow down the list generated. *Fields marked * are required*.

Client Search New:

The 'Client Search New' screen finds possible matches using the required search fields. (*reference figure 2-4*).

Setup:

On the 'Client Search New' screen.

- 1. Enter required fields (without wild cards) with legal first name, last name, SSN/SID, and date of birth (DOB) (*reference figure 2-4*). The "Create ID" button will automatically create an SID to search for a client who may be assigned a system ID versus a SSN. System ID is created by OPUS (or can be manually done): SYSID sequence is as follows: "S" + first 5 letters of the client's first name + month, day, year (MMDDYY) of client's birth date.
- **2.** Click the "Search" button. The search button becomes activated when information is typed into any of the boxes. If "No Results found" is displayed, the client can be added as a new client to the OPUS database (*reference figure 2-4A*).

OPUS Energy Assistance	e	Agency	: OHCS			User: Timeout:	TESTUSER 19:19 Log Out	Dugoon
\frown		Client 🔻	Program 🔻	Fiscal 🔻	Management *	▼ Reports ▼	Help 🔻)
Client Search View	Clien	t Searc	ch New					Version 3.0.4T
New Edit	New Clie	nt Informa	tion (Fields ma	arked with	are required,	wildcards will be	e removed)
Residence	First Name	Ī	KOR			DOB 09-21-19	12 🛄 (mm-dd-yyyy)*
View New Edit	Last Name	F	SON-OF-RYNA	२	2	Create	ID	
Household	SSN/Sys#		SKOR092112	*				Search
View Mail/Ph Update NCB Update	OPUS will :	search the d	atabase to find t	nis client befo	ore creating a new	record.		
Move Client to HH HH to Residence Merge HH								
Energy Education View Kit Component New								
								Data Classification: 3
			Oregon H	ousing and	Community Servi	ices ©		

Figure 2-4: Client Search New

Note: OPUS utilizes several different ways to find potential duplicate clients. Please review the list first prior to entering new clients into the database.

<u>Client New</u>

This step is only used after determining the client is not in the system and <u>all</u> search attempts have been exhausted.

Setup:

On the 'Client Search New' screen.

1. Click the 'Add New Member' button (*reference figure 2-4A*). The 'Client New' screen appears (*reference figure 2-5*).

OPUS Energy Assistance				Timeout:	Log Out Housing an	CON Community Services			
	Client 🔻 I	Program 🔻 Fiscal	 Management 	▼ Reports ▼	Help 🔻	Version 3.0.4T			
Client Search View	Client Search	n New				Version 3.0.41			
New Edit	New Client Informatio	on (Fields marked wit	h* are required,	wildcards will be	removed)				
Residence View	First Name	R	*	DOB 09-21-191	2 (mm-dd-yy	уу)*			
New Edit	Last Name SON-OF-RYNAR * Create ID								
Household	SSN/Sys#	SSN/Sys# Search							
View Mail/Ph Update NCB Update	OPUS will search the da	client b	efore creating a new	w record.					
Move	Possible Pre-Existing	Client Matches							
Client to HH HH to Residence	SSN # First Name Last Name DOB								
Merge HH	No Results Found								
Energy Education View Kit Component New					Ad	d New Member			
					Da	ta Classification: 3			
		Oregon Housing ar	d Community Serv	vices ©					

Figure 2-4A: Client Search New – No Results Found

- Client name, birth date, SYSID/SSN is already filled in from being entered on the 'Client Search New' screen. Complete the rest of the new client information. *Fields marked with* * *require responses to be selected*. There are several buttons with dropdown arrows for different choices.
 - Title; salutation if necessary.
 - Legal first name, middle name, last name, suffix. *
 - Review social security number or system identification number for accuracy.
 - SSN Verification. * This is to describe if the SSN is full or 'don't know/don't have' or 'refuse' for system identification.
 - Client 'Comments' Box
 - One phone number, extension, and type.
 - Mailing Address: *

The first client created for a household, type their mailing address in provided boxes. For subsequent clients, the select from drop-down menu will display previous mailing addresses.

- Street number, Street direction: S, N, NE, NW, etc.
- Street name.

- Street type: Ave, Lane, etc.
- Unit type: Apt, Unit, PO Box, etc.
- Enter an apt number or PO Box number.
- City or Zip Code
- Gender *
- Disabled *
- Ethnicity *
- Veteran *
- Language.
- Education.
- Homebound
- Transportation (if Homebound set to 'YES')
- Race.*
- Oregon Tribe Option (if Native American has been selected)
- Non-Cash benefits client receives *
- Does this client have any income *

 (None, Yes, None-Zero Income Statement, Don't Know, Refused).
 If 'None-Zero Income Statement' is selected a required 'Zero Income Comment' block appears; otherwise it is hidden.

Click the 'Save' button.

Items marked with * required responses to be selected. Other items are optional and can be left blank.

OPUS Energy Assistance								
	Client Program Fiscal Management Reports Help Housing and Community Services							
Client Search View	Client New Version 3.0.4T							
New Edit	Client Information (Fields marked with * are required.)							
Residence	Title							
View New	First Name KOR * Middle Last Name SON-OF-RYNAR * Suffix							
Edit	DOB [09-21-1912 [1](mm-dd-yyyy)* SSN/Sys# [SKOR092112 * Create ID]							
Household View	Adult Id Verified?							
Mail/Ph Update NCB Update	Comments							
Move Client to HH HH to Residence Merge HH	▼							
Energy Education	2000 characters left (spaces count)							
View Kit Component New	Phone							
	Primary Phone 503-988-8888 503-555-1212 EXT WORK Type							
	Mailing Address*							
	No. Direction Street Name Type Direction Unit # 999 PAGH ST T Type Type							
	City ST Zip Code +4 County							
	ENTERPRISE-97828 • OR 97828-ENTERPRISE • WALLOWA							
	Client Characteristics Gender: MALE Ethnicity: REFUSED Education: POST SECONDARY, NO DEGREE Homebound: Transport:							
	Race (Check all that apply)*							
	African American O Don't Know							
	American Indian/Alaska Native Refused Asian							
	□ Native Hawaiian or Pacific Islander Oregon Tribes							
	White							
	Non-Cash Benefits (Check all that apply)*							
	SNAP Oregon Health Plan MEDICARE O None WIC VA Med Serv TANF Child Care O Don't Know TANF Trans Other TANF Public Rental Assist O Refused Other Health Ins Other Source Temp Rental Assist O Refused							
	Income Does this client have any income? NONE - ZERO INCOME STATEMENT *							
	Zero Income Comments : Required zero income comments should be entered here.							
(Save							
	Data Classification: 3							
	Oregon Housing and Community Services ©							

Figure 2-5: Client New Screen.

<u>Client View</u>

The 'Client View' screen will appear after a new client record is created or edited (*reference figure 2-6*). Use this screen to review the accuracy of information entered from the 'New' or 'Edit' screens.

Note: When you change the 'Does this Client have any income?' response to YES and save, the New income button appears and the 'Zero Income Comment' box disappears.

Viewing the HH View screen to verify information will be covered several times throughout this manual.

OPUS Energy Assistance	Agency: Client Client V	KOR SON-OF-RYNA		gement 🔻	User: TESTU Timeout: 19:39 Log Reports ▼ Help	Out Orecon Housing and Con	ununity Services				
C lient Search	Client View						Version 3.0.4T				
/iew New Edit	Select Another Client in F		YNAR 🗾 Go	0							
Residence View	Client Information										
lew	DOB: 09-	R SON-OF-RYNAR -21-1912	55	SN/SYS ID# Age:	SKOR092112 101						
lousehold	SSN Verification: YES Adult ID Verified? YES										
iew lail/Ph Update CB Update	Comments:					<u>A</u>					
ove											
ient to HH H to Residence	Dhaway 50	000 0000 Turner W				v					
erge HH nergy Education	Phone: D	3-988-8888 Type: W	VORK Edit	Delete Type: CELI	▼* Add						
ew t Component New											
	Mailing Address										
	999 PAGH ST ENTERPRISE, OR 97828 County WALLOWA										
	Client Characteristics										
	Gender: MALE Disability: NO										
	Ethnicity: REFUSED Veteran: YES										
	Education: POST SECONDARY, NO Language: MAYAN GROUP DEGREE										
	Homebound: UN	IKNOWN		Race:	REFUSED						
	Oregon Tribe:										
	Edit Client View Household										
	Non-Cash Benefits										
	N SNAP N VA Med Serv	N Oregon N TANF C	Health Plan bild Care		MEDICARE TANF Trans	N WIC N Other TANF					
	N Public Rental Assist	N Other H			Other Source	N Temp Rental Assi	st				
	Payments - This Hou										
	Name Amou	int Chk No	Ch	k Date	Auth #	Type St	atus				
	Payments - Previous	s Household (Sorte	d by Name th	en Auth #,	click header to cha	nge secondary sor	t)				
	Income/Employer (Setting to None, No	<u>ne - Zero In</u>	ome, Don't	Know or Refused w	ill delete all incom	e)				
	Does this client have	any income? YES	;		Save						
	Туре	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude				
(New Income	Total	\$0.00	\$0.00							
		1				Data Cl	assification: 3				
		Oregon Housing	a and Commu	nitu Comico							

Figure 2-6: Client View with Income/Employer info Screen

OPUS Energy Assistance		gency: Client:	OHCS KOR SON-OF	-RYNAR			User: Timeout:	TESTUSER 19:39 Log Out	Orecon Housing and Con	
	Clie	nt 🔻	Program 🔻	Fiscal	▼ Man	agement 🔻	Reports 🔻	Help 🔻	Housing and Con	nmunity Services
Client Search	Client V	iew								Version 3.0.4T
View New Edit	Select Another Cl	ient in H	H KOR SON	I-OF-RYI		ìo				
View New	Select Another Cl Client Informa D SSN Verificati Commer Pho Pho Pho Pho Pho Pho Client Charact Geno Ethnic	ent in F ation	R SON-OF-RYN 21-1912 3 3-988-8888 T County WAL s LE FUSED ST SECONDAR KNOWN Household N C N C N C N C N C	AR ype: WO * Ext LOWA Y, NO Dregon H FANF Chil Dther Hez ed by Na Chk No	ealth Plan d Care anne then	Disability: Veteran: Language: Race:	L YES	N W N O' N Tr ange seco	ther TANF emp Rental Assi ndary sort) — Type S	tatus
	Does this clier	Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income) Does this client have any income? NONE - ZERO INCOME STATEMENT Zero Income Comments: Required zero income comments should be entered here.								
	1947 characters	left (sp	aces count)	I			▼ *			
	Туре	1	Source/E		Monthly	Annual	Verified Da	ate L	ast 30 Days	Exclude
	New Income			Total	\$0.00	\$0.00				
									Data Cl	assification: 3
			Oreaon H	lousina	and Comm	unitv Service	s ©			

Figure 2-7: Client View with Zero Income Comments Box Screen

If 'None –Zero Income Statement' is selected the 'Zero Income Comment' box will appear (reference figure 2-7) and requires and entry.

Household Mail and Phone Update

To update the mailing address from the household click on the 'Mail/Ph Update' link located on the Left Nav Bar (*reference figure 2-8A*).

OPUS Energy Assistance		Agency: OHCS Client: WORF SON-OF-MOGH Residence: ENTERPRISE, OR 97828				User: TESTUSER Timeout: 19:48 Log Out				
		Client 🔻	Program 🔻	Fiscal 🔻	Management 🔻	Reports •	Help 🔻	Version 3.0.4T		
Client Search	Clien	t View	7					VCI3011 5.0.41		
View New Edit	Select Anot	her Client in I	HH WORF SC	N-OF-MOGH	Go					
Residence	Client Ir	formation -								
View New		Name: W	ORF SON-OF-MO	GH	SSN/SYS ID#	SWORF040365	;			
Edit		DOB: 04	-03-1965		Age:	48				
Household	SSN Verification: YES Adult ID Verified? YES Comments:									
Mail/Ph Update								<u>*</u>		
Move Client to HH								*		
HH to Residence Merge HH	1	Phone: 50	3-999-0000 Ty	pe: CELL	Edit Delete					
Energy Education View		Phone:		* Ext:	Type: CEL	*	Add			
Kit Component New	Mailing	Address —								
	P.O. BOX	1701								
	ENTERPRI	SE, OR 97828	County WAL	LOWA						
	Client C	haracteristic	s							

Figure 2-8A: Client View Screen

The 'Household Mail and Phone Update' Screen will now appear (*reference figure 2-8B*). You can select a new mailing address from the drop down or enter and new mailing address.

OPUS Energy Assistance	Agency: OHCS Client: WORF SON-OF-MOGH Residence: ENTERPRISE, OR 97828 Client V Program V Fiscal V Management V Reports V Help V
Client Search View New Edit Residence View New Edit Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence	Version 3.0.4T Household Mail and Phone Update Update Mailing Address for Household (Choose an address from menu, OR enter a new one below) Update Mailing Address for Household (Choose an address from menu, OR enter a new one below) P.O. BOX 1701 - ENTERPRISE OR, 97828
Merge HH Energy Education View Kit Component New	clients in the household.) WORF SON-OF-MOGH Phone: 503-999-0000 Type: CELL Phone: 800-555-9422 Type: HOME Phone: Add Add HH Delete HH ALEXANDER ROZHENKO Phone: 800-555-9422 Type: HOME Phone: CELL Add Add HH Delete HH
	K'EHLYR WORF Phone: Type: HOME Ext: Type: CELL KURN SON-OF-MOGH Phone: Type: HOME Edit Delete Phone: Type: HOME Edit Delete Edit Delete HH Delete Edit Delete Phone: Type: HOME Edit Delete Phone: Type: CELL
	Delete HH Data Classification: 3 Oregon Housing and Community Services ©

Figure 2-8B: Household Mail and Phone Update Screen – Update HH Mailing Address

You can add or delete additional telephone numbers to/from individuals or the entire household by entering the telephone number and selecting the corresponding button (*reference figure 2-8C*)

OPUS Energy Assistance	Agency: OHCS User: TESTUSER Client: WORF SON-OF-MOGH Residence: ENTERPRISE, OR 97828 Client Program Fiscal Management Reports Help
Client Search View New Edit Residence View New Edit Household View	Version 3.0.4T Update Mailing Address for Household (Choose an address from menu, OR enter a new one below) * Update Mailing Address for Household (Choose an address from menu, OR enter a new one below) * "HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¾ miles past mile post marker 35 on Hwy 166. No. Direction Street Name Type Direction Unit # City ST Zip Code +4 County
Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH Energy Education	Select One V ORSelect One V ORSelect One V ORSelect One V OR ORSelect One V OR
View Kit Component New	Phone: 503-999-0000 Type: CELL Edit Delete Phone: 503-999-0000 * Ext: Type: CELL * Add Add HH Delete HME Ext: Type: CELL * Add HH
	ALEXANDER ROZHENKO Phone: 800-555-9422 Phone: 503-888-6888 * Ext: Type: CELL Add Add HH Delete HH
	K'EHLYR WORF Edit Delete Phone: 800-555-9422 Type: Type: Edit Delete Phone: 800-555-9422 * Ext: Type: CELL * Add Add HH Delete HH Delete HH Delete HH Delete HH
	KURN SON-OF-MOGH Phone: 503-000-99999 Type: Type: CELL * Add Add Delete HH Delete HH
	Data Classification: 3 Oregon Housing and Community Services ©

Figure 2-8C: Household Mail and Phone Update Screen – Modify HH Phone Numbers.

<u>Client Non-Cash Benefits Update</u>

To update the non-cash benefits from the 'Client View' screen click the 'Edit' link located on the Left Nav Bar under Client or the 'Edit Client' button located in the Client Characteristics section of the Client View screen (*reference figure 2-9A*).

OPUS	Agency				User: TES			COT OF		
Energy Assistanc		: KOR SON-OF-RYNA	ĸ		Timeout: 18:	3 Out 07	egon			
	Client 🔻	Program 🔻 Fisc	al 🔻 Mana	gement 🔻	Reports 🔻 He	lp 🔻 Housing	and Comm	unity Services		
Client Search	Client View	,					V	ersion 3.0.4T		
View New	Select Another Client in H			D						
Edit	□ Client Information [−]									
Residence View		R SON-OF-RYNAR	S	5N/SYS ID#	SKOR092112					
New Edit		-21-1912		Age:						
Household View	SSN Verification: YE Comments:	5	Adult	ID Verified?	YES					
Mail/Ph Update NCB Update							A			
Move Client to HH							-			
HH to Residence Merge HH	Phone: 50	3-988-8888 Type: V	ORK Edit	Delete						
Energy Education View Kit Component New	Phone:	* E	xt:	Type: CELL	▼* Add					
Kit Component New	Mailing Address									
	999 PAGH ST ENTERPRISE, OR 97828 County WALLOWA									
	Client Characteristics									
	Gender: MALE Disability: NO									
	Ethnicity: REFUSED Veteran: YES Education: POST SECONDARY, NO Language: MAYAN GROUP									
	DEGREE	51 526615710716		Lunguager						
	Homebound: UN Oregon Tribe:	IKNOWN		Race:	REFUSED					
	Edit Client View	Household								
	Non-Cash Benefits									
	N SNAP N VA Med Serv	N Oregon N TANF C	Health Plan hild Care		MEDICARE TANF Trans	N WIC N Other TANF				
	N Public Rental Assist	N Other H			Other Source	N Temp Rent	al Assist			
	- Development - This	reshald (Control 1	Na		h					
	Payments - This Hou Name Amou			k Date	Auth #		Stat			
		Cinc No			69til #	Туре	Stat			
	Payments - Previou	s Household (Sorte	d by Name th	en Auth #, o	click header to ch	ange seconda	ry sort)			
	「 Income/Employer (Setting to None, No	ne - Zero Ind	come, Don't	Know or Refused	will delete all	income])		
	Does this client have	e any income? YES	3		▼ Save					
	Туре	Source/Emp	Monthly	Annual	Verified Date	Last 30 D	avs	Exclude		
	New Income	Total	\$0.00	\$0.00			,-			
						D	ata Clas	sification: 3		
		Oregon Housin	g and Commu	inity Service	s ©					
Figure 2-9	A: Client View S	creen - Edit C	lient Butt	on and L	eft Nav Bar I	ink				

The Client Edit screen (*reference figure 2-9B*) should now appear. Go to the bottom of the screen were you will find the Non-Cash Benefits section. Select and/or deselect the appropriate check boxes and select 'Save Changes' button (reference figure 2-9B).

OPUS Energy Assistance	Logour O'record
	Client Program Fiscal Management Reports Help Housing and Community Services
Client Search View	Client Edit
New Edit	Client Information (Fields marked with * are required.)
Residence View New	Title First Name KOR * Middle Last Name SON-OF-RYNAR * Suffix V
Edit	DOB 09-21-1912 (mm-dd-yyyy)* SSN/Sys# SKOR092112 * Create ID
Household View Mail/Ph Update NCB Update	Adult Id Verified?
Move Client to HH HH to Residence Merge HH	
Energy Education	2000 characters left (spaces count)
Kit Component New	Mailing Address*
	(Choose an address from the list, add a new address, or edit the current mailing address below) Edit Current Mailing Address
	"HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¾ miles past mile post marker 35 on Hwy 166. No. Direction Street Name Type Direction Unit #
	No. Direction Street Name Type Direction Unit # 999 Image: PAGH ST Image: ST Image: ST Image: ST
	City ST Zip Code +4 County ENTERPRISE-97828 OR 97828-ENTERPRISE WALLOWA
	Client Characteristics
	Gender: MALE
	Ethnicity: REFUSED * Veteran: YES * Education: POST SECONDARY, NO DEGREE Language: MAYAN GROUP
	Homebound: Transport: NO Y
	Race (Check all that apply)*
	African American O Don't Know American Indian/Alaska Native O Refused
	□ Asian
	Native Hawaiian or Pacific Islander Oregon Tribes White
•	Non-Cash Benefits (Check all that apply 2
	SNAP Oregon Health Plan Image: Care Image: None WIC Image: Care Image: Care Image: Care Image: Care TANF Trans Other TANF Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Image: Care Imag
	Save Changes
	Data Classification: 3
	Oregon Housing and Community Services ©

Figure 2-9B: Client Edit Screen – Non-Cash Benefits

OPUS Energy Assistanc	OPUS Energy Assistance		_		User: TEST Timeout: 19:5 Log	out Oreco	N Contractions
	Client 🔻	Program v Fisc	al 🔻 Mana	igement 🔻	Reports Help) •	Version 3.0.4T
Client Search	Client View						Version 5.0.41
View New Edit	Select Another Client in H	H KOR SON-OF-R	YNAR - G	D			
Residence	Client Information						
View New		R SON-OF-RYNAR -21-1912	S		\$ SKOR092112 : 101		
Edit Household	SSN Verification: YE		Adult	ID Verified?			
View	Comments:						- I
Mail/Ph Update NCB Update Move						-	
Client to HH HH to Residence							·
Merge HH		3-988-8888 Type: V		Delete			
Energy Education View Kit Component New	Phone:	* t	ixt:	Type: CEL	L* Add		
	Mailing Address						
	999 PAGH ST ENTERPRISE, OR 97828	County WALLOWA					
	· · ·						
	Client Characteristic						
	Gender: MA Ethnicity: RE			Disability: Veteran			
		ST SECONDARY, NO		Language	MAYAN GROUP		
	DEGREE Homebound: UN	KNOWN		Race	REFUSED		
	Oregon Tribe:			nucc			
	Edit Client View	Household					
	Non-Cash Benefits						
	N SNAP		Health Plan		MEDICARE		
	V VA Med Serv	N TANE C			Other Source	N Other TANF N Temp Rental As	sist
	Payments - This Hou		Name then A	uth #, click	header to change s		
	Name Amou	nt Chk No	Ch	k Date	Auth #	Туре	Status
	Payments - Previous	s Household (Sorte	d by Name tl	nen Auth #,	click header to cha	nge secondary so	ort)
	🛛 Income/Employer (Setting to None, No	ne - Zero In	come, Don't	t Know or Refused w	ill delete all inco	ne)
	Does this client have						
					Save		
	Туре	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
	New Income	Total	\$0.00	\$0.00			
						Data (lassification: 3
		Oregon Housin	g and Commi	unity Service	es ©		

Figure 2-9C: Client View Screen – Reflecting Non-Cash Benefits changes

Income & Employer

Setup:

Using the 'Household View', click on the individual household member 'SSN/SYSID' to open 'Client View' screen.

1. Click the button "New Income/Employer" (*reference figure 2-10*). The 'Income & Employer New' screen will appear next.

OPUS Energy Assistanc	e	_	: OHCS : KOR SON-O	F-RYNA	R		User: Timeout:	TESTUS 19:51 Log Ou	n Orego	on Contractions	
	Clie	nt 🔻	Program 🔻	Fisc	al 🔻 Ma	nagement 🔻	Reports •	Help `			
Client Search	Client V	'iew								Version 3.0.4T	
View New Edit	Select Another C			N-0F-R		Go					
Residence View	Client Information Name: KOR SON-OF-RYNAR SSN/SYS ID# SKOR092112										
New Edit	DOB: 09-21-1912 Age: 101										
Household View	SSN Verification: YES Adult ID Verified? YES Comments:										
Mail/Ph Update NCB Update									-	<u> </u>	
Move Client to HH HH to Residence							1			-	
Merge HH		_	3-988-8888 T		ORK Ed			A			
Energy Education	Pho	one:		E	A.G	Type: CE		Add			
Kit Component New	Mailing Addre										
	999 PAGH ST										
	ENTERPRISE, OR 97828 County WALLOWA										
	Client Characteristics										
	Gender: MALE Disability: NO Ethnicity: REFUSED Veteran: YES										
	Education: POST SECONDARY, NO Language: MAYAN GROUP										
	DEGREE					_					
	Homebou Oregon Tr		IKNOWN			Race	e: REFUSED				
	Edit Client		Household								
	⊤ Non-Cash Bei	nefits -									
	N SNAP		N	Oregon	Health Plan	Y	MEDICARE	N	WIC		
	Y VA Med Serv N Public Rental		N	TANF C	hild Care ealth Ins	N	I TANF Trans I Other Source		Other TANF Temp Rental As	sist	
	Payments - T	his Hou	isehold (Sor	ted by	Name ther	Auth #, clic	k header to ch	ange sec	ondary sort)		
	Name	Amou	int	Chk No		Chk Date	Auth #		Туре	Status	
	Payments - P	revious	s Household	(Sorted	l by Name	then Auth #	, click header (to change	e secondary so	ort)	
	☐ Income/Emp Does this clie		-			ncome, Don	't Know or Refu	sed will	delete all inco	me)	
				1.20			Save				
	Туре		Source/E	Emp	Monthly	Annual	Verified D	ate	Last 30 Days	Exclude	
	New Income			Total	\$0.0	0 \$0.00	D				
	\sim								Data (Classification: 3	
			Oregon I	Housing) and Com	munity Servio	ces ©				

Figure 2-10: Client View – New Income Button

2. On the Income and Employer Screen, (*reference figure 2-11*). Type or Select:

Source (such as employer's name)	* Verified Date
* Type of the income: i.e. SSI	Income received in past 30 days
* Amount	Don't Use This Record Creating Payments
* Frequency	Enter Comments as needed
* Verified How	Employer Information & address
* Verified By who	(follow steps as required)
 * Amount * Frequency * Verified How 	Don't Use This Record Creating Payments Enter Comments as needed Employer Information & address

Click the 'Save' button, the 'Client View' screen will re-appear with the income displayed. If the client has an employer, you can enter this information by following the same steps done for income (*reference figure 2-11*).

OPUS Energy Assistance	•	Agency Client	: OHCS : KOR SON-OF	-RYNAR		User: TESTUSER Timeout: 18:40 Log Out		
		Client 🔻	Program 🔻	Fiscal 🔻	Management 🔻	Reports 🔻	Help 🔻	
Client Search View New Edit Residence View New Edit Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence	Income (Sou T Amo Verified I Income ro Comm	(Fields mar urce: STAT ype: UNE punt: 250.00 How: Chec eceived in	k Pay Stub past 30 days?	quency Mo		rified Date: [] n creating Pay		Version 3.0.4T
Merge HH Energy Education View Kit Component New		ss 2:	Ex					
								Data Classification: 3
			Oregon H	ousing and (Community Service	s©		

Figure 2-11: Income & Employer New Screen

Click the 'Save' button (*reference figure 2-11*) and the 'Client View' screen will appear next with the income added and displayed in the Income section (*reference figure 2-12*).

OPUS Energy Assistance	Agency: OHCS Client: KOR SON-OF-RYN Client V Program V Fi				User: TESTUS Timeout: 19:39 Log O eports ▼ Help	Housing and Com	munity Services						
Client			Mallay	ement▼ R	eports reip		Version 3.0.4T						
Search View	Client View			1									
New Edit	Select Another Client in	HH KOR SON-OF-RY	NAR 🚽 Go										
Residence	Client Information												
View New Edit		Name: KOR SON-OF-RYNAR SSN/SYS ID# SKOR092112 D08: 09-21-1912 Age: 101											
Household	SSN Verification:		Adult ID	Verified? YE									
View Mail/Ph Update NCB Update	Comments:					<u>*</u>							
Move Client to HH HH to Residence						¥							
Merge HH		503-988-8888 Type: WC		Delete									
Energy Education View Kit Component New	Phone:	* Ex	t: T	ype: CELL	▼* Add								
Kit Component New	Mailing Address												
	999 PAGH ST ENTERPRISE, OR 978	28 County WALLOWA											
	Client Characteris	tics											
	Gender:		I	Disability: NO									
	Ethnicity: I Education: F	POST SECONDARY, NO		Veteran: YE: anguage: MA									
	DEGREE				FUEFD								
	Homebound: Oregon Tribe:	JNKNOWN		Race: RE	FUSED								
	Edit Client View	w Household											
	Non-Cash Benefits												
	N SNAP Y VA Med Serv	N Oregon H N TANF Chi				WIC Other TANF							
	N Public Rental Assis	t Y Other He	alth Ins	N Oth	er Source N	Temp Rental Assis	t						
	Payments - This H	ousehold (Sorted by N	ame then Au	th #, click hea	ader to change se	condary sort) —							
	Name Am	ount Chk No	Chk	Date	Auth #	Type St	atus						
	Payments - Previo	us Household (Sorted	by Name the	n Auth #, clic	k header to chang	je secondary sort	.)						
	☐ Income/Employer	(Setting to None, Non	e - Zero Inco	me, Don't Kno	ow or Refused will	delete all incom	e)						
		ve any income? YES											
					Save								
	Туре	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude						
	UNEMPLOYMENT	STATE OF OREGON	\$250.00	\$3,000.00	09-28-2012	Y	N						
	New Income	Tota	\$250.00	\$3,000.00									
						Data Cla	ssification: 3						
		Oregon Housing	and Commun	ity Services ©)								

Figure 2-12: Client View Screen – Updated Income

Residence Search

A residence may exist in the database but may be linked to an old household record. If a client is located at an old address or linked to another household, go to **Section 3 - Move Client(s) to Unknown** and follow the steps. This process moves clients from an old residence record in order for you to use it for processing a new intake.

Note: If a client is "Active" in another program enrollment, possibly in another OPUS module for services, the client <u>cannot</u> be moved from the HH without being exited from the 'other' open enrollment. The OPUS user can search other modules he/she has access to or contact their agency's OPUS Administrator for assistance. If the agency does not have access to another module and receives an error message "The client cannot be moved due to another open enrollment", contact OPUS Helpdesk <u>opushelp@hcs.state.or.us</u>.

Residence New

Setup:

While in the 'Client Search' screen.

- 1. In the address box, type a street number and street name (with spaces between as needed). If a street number isn't available, use a "%" in front of the street name, such as % Stevens St.
- 2. If there is an apartment or unit number, use one of these formats: Apt #, Unit #, or Spc #.
- **3.** Type a city and zip code to narrow the results to this region of the state (*reference Figure 2-13*).

Note: At any time, searching for a client by address, the percent symbol (%) is considered a 'wild card'. Enter the percent sign followed by the street name then click 'Search', the system will search for any addresses close to matching what you entered.

4. When a residence is found in the database, the address, city and zip code will be displayed in the 'Search Results'.

5. If the residence is not in the result list, you'll see 'No Results Found'. A new residence can be created (*reference figure 2-13A*). When household members have not been found in the database, click the 'New' link under 'Client' on the 'Left Nav Bar'. The goal is to find any records from the client's application first, and find out which household members already exist in the database before creating new records (*reference figure 2-13B*).

OPUS Energy Assistance			User: Timeout:	Log Out	Orecon Housing and Com			
	Clie	ent 🔻 Program 🔻	Fiscal 🔻	Management 🔻	Reports 🔻	Help 🔻	nousing and com	and any services
Client Search View New	Client S							Version 3.0.4T
Edit	-	neters (at least one f				_		_
Residence	SSN/SYSID:		- Ad	Idress: %VORCHA		Ur	nit:	(ie Apt B)
View New	First Name:		_	City: ENTERPR				
Edit	Last Name:			Zip:	Show Resi	dence Info.	only	
Household	When you Clic	k in Search Results:	Sea	rch				
View		Household Screen		red Search				
Mail/Ph Update	Client's Name =		Advan	ced Search				
NCB Update		ess = Residence Screer						
Move Client to HH		100 results will be retur						
HH to Residence Merge HH				Search Results	5			
Energy Education			\sim	No Results Found				
View Kit Component New	SSN #	First Name		Last Name	Birth Year	Address	Unit	City
							Data di	
							Data Cla	ssification: 3
		Oregon H	ousing and	Community Service	es ©			

Figure 2-13: Client Search, Residence New Search – No Results Found.

OPUS Energy Assistance	e	Agenc	Y: OHCS			User Timeout	: TESTUSER : 18:29 Log Out	Oregon (
		Client 🔻	Program 🔻	Fiscal 🔻	Management	▼ Reports ▼	Help 🔻	Housing and Community Services
Client Search View New Edit			New					Version 3.0.4T
Residence View New Edit Household View Mail/Ph Update NCB Update	PO Box is "HOMELES Oak St. B No. 1701 <u>City</u>	not a valid r SS" is not a v ridge at 3rd :	St; Super Center tion Street Na VORCHA	no permanen Parking Lot meSt. <u>Zip</u>	on Main; ¾ miles	past mile post ma Type * AVE	Direction	
Move Client to HH HH to Residence Merge HH	Residence		/Mobile 💌	* Residen	ce Status Ren	(Heat not)		.] s:
Energy Education	Energy So	ources (*) -	At least one sou		must be selected			
View Kit Component New	Electr	al Gas [Wood Pellet Solar Other		Primary Source	ELECTRIC	*	Save Data Classification: 2
			Oregon H	ousing and	Community Serv	ices ©		

Figure 2-13A: Residence New Screen

4. When a residence is found in the database, the address, city and zip code will be displayed in the 'Search Results'.

5. If the residence is not in the result list, you'll see 'No Results Found'. A new residence can be created (*reference figure 2-13A*). When household members have not been found in the database, click the 'New' link under 'Client' on the 'Left Nav Bar'. The goal is to find any records from the client's application first, and find out which household members already exist in the database before creating new records (*reference figure 2-13B*).

OPUS Energy Assistance		oncs Program V Fiscal V	Management			Levices
Client Search View New Edit	Client Search	New n (Fields marked with *	are required,	wildcards will be re		Version 3.0.3P
Residence View New Edit Household View Mail/Ph Update NCB Update	SSN/Sys# SW	N-OF-MOGH ORF040365 * base to find this client befo	* * re creating a new	DOB 04-03-1965 Create ID	(mm-dd-yyyy)*	Search
Move Client to HH HH to Residence Merge HH Energy Education View Kit Component New	Possible Pre-Existing (SSN # No Results Found	Client Matches First Nam	3	Last Na	Add Ne	DOB w Member
		Oregon Housing and	Community Serv	ices ©	Data Cla	assification: 3

Figure 2-13B: Client Search New - Residence New Screen

Verifying Data on Views

In general, for all view screens, you should review to verify data entered. If information needs to be edited, the 'Edit' links or buttons are available to update or correct information. Most "View Screens" are for viewing purposes, the <u>two exceptions</u> are the 'Household View' and 'Client View' screens.

Add Clients to Household

Adding clients to an existing household is easiest when at least one client and the residence have been created initially (*reference figure 2-14*).

OPUS Energy Assistance	Agency: OHCS Client: KOR SON-OF-RYNAR Client: KOR SON-OF-RYNAR Log Out Housing and CA									egon						
		Clier	nt 🔻	Progr	am 🔻	Fiscal 🔻	Man	ageme	nt 🔻 🛛	Report	s 🔻	Help 🔻	Housing	and Com	munity Services	
Client Search View	Ho	useho	old V	Viev	N										Version 3.0.4T	
New Edit	Hous	ehold - C	lick SS	SN/SYS	SID will	open the C	lient V	iew Sci	reen. Ho	ver ov	er code	for full	l versior	. —		
Residence	нн м	embers						-	Bold Re	d elem	ents indi	cate poo	r data qu	ality		
View New	R	SSN/SY	SID		Nam	e	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
Edit		SKOR092	2112	KOR S	ON-OF-F	RYNAR	101	М	PS	Y	N	RF	RF	Y	Y	
Household View Mail/Ph Update NCB Update		w Client emove H		old: Cl	ick this b	outton			Move	Entire	House	hold to	Unknow	vn		
Move Client to HH	Payn	nents - Th	ed by Name	Auth #,	, click he	eader t	o chang	ge seco	ndary so	ort) —						
HH to Residence Merge HH	Nam	e	Amou	unt	C	Chk No	C	hk Date		Au	ith #		Туре	St	atus	
Energy Education View Kit Component New	Payn	Payments - Previous Household (Sorted by Name t							ıth #, cli	ck hea	der to a	change :	seconda	ry sort)	
	Clien	t Vendor	(Vend	ors in	red are	expired)			Income	Summ	ary —					
	Vend	/endor Type Pri Acct# Name/Acct KOR SON-OF-RYNAR \$3,000.00														
	New	Vendor		•					Househ	old Su	nmary					
	Addr	ess						[Total Inc	ome					\$3,000.00	
	т	Addres	55						% of Pov	/erty				26%		
	м	999 PAC ENTERP		DR 9782	28				% of OM Total # (105				8%	
	Phon	es							HH Type		113				*	
	Т	Number			Client	Name			Househo	ld Subs	idized					
	W	(503) 988	-8888		KOR SO	DN-OF-RYNA	R				Mak	ce any ch	nanges?	Save	Changes	
				Or	regon H	ousing and	Comm	unity S	2000 cha	aracters		aces cou	-	ata Cla	ssification: 3	

Figure 2-14: Household View Screen - Adding New Client to HH

Setup:

On the 'Household View' screen:

1. On the Left Nav Bar, under 'Client', click the 'New' link. The 'Client New' screen will appear. If the client's HH member is not listed, click 'Add New Member' (*reference figure 2-15A*).

Add Clients to Household (continued)

Some household information will be previously entered due to the first client enrolled such as: address, home phone number. Drop-down menus are available to select from for subsequent household member(s) entered or you can manually enter new mailing addresses or phone numbers for each individual.

OPUS Energy Assistance	e	-	7: OHCS t: KOR SON-OF	-RYNAR		User: Timeout:	recon	
		Client 🔻	Program 🔻	Fiscal 🔻	Management 🔻	Reports 🔻	Help 🔻	
Client Search View New		t Sear	ch New					Version 3.0.4T
Edit	current	nousenoid	rembers					
Residence	1			ame		Age		
View New	٤		KC	DR SON-OF-R	YNAR		М	101
Edit								
Household	New Clie	ent Informa	tion (Fields ma	arked with *	are required, wi	ldcards will be	e removed) —	
View Mail/Ph Update		ſ	KANG		* .		10	
NCB Update	First Name				- L	ров 12-12-19	13 🛄 (mm-da	1-yyyy)*
Move	Last Name	•	SON-OF-AROK		*	Create	e ID	
Client to HH	SSN/Sys#	.	SKANG121213	*				Search
HH to Residence Merge HH		,						
-	OPUS will	search the d	atabase to find t	his client befo	ore creating a new re	scord.		
Energy Education View								
Kit Component New	Possible	Pre-Existi	ng Client Match	ies				
		SSN #		First Name	e	Las	t Name	DOB
	No Result	s Found	1					
								Add New Member
								Add New Member
								Data Classification: 3
			Oregon H	ousing and	Community Service	s ©		

Figure 2-15A: Client Search New - Add new HH member search

Add Clients to Household (continued)

OPUS Energy Assistance	Agency: OHCS Client: KOR SON-OF-RYNAR Client V Program V Fiscal V Management V Reports V Help V Help V
Client Search View	Client New Version 3.0.4T
New Edit	Client Information (Fields marked with * are required.)
Residence	Title 🔽
View New	First Name KANG * Middle Last Name SON-OF-AROK * Suffix
Edit	DOB 12-12-1913 (mm-dd-yyyy)* SSN/Sys# SKANG121213 * Create ID
Household View	Adult Id Verified?
Mail/Ph Update NCB Update	Comments
Move Client to HH HH to Residence Merge HH	
Energy Education View	2000 characters left (spaces count)
Kit Component New	Phone
	Primary Phone OR enter new number below.
	Primary Phone 503-555-1212 EXT HOME Type
	Mailing Address*
	(Choose an address from the list, add a new address, or edit the current mailing address below)
	999 PAGH ST - ENTERPRISE OR, 97828
	"HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¾ miles past mile post marker 35 on Hwy 166.
	No. Direction Street Name Type Direction Unit # 1701 VORCHA AVE VUNIT 5
	City ST Zip Code +4 County ENTERPRISE-97828 OR 97828-ENTERPRISE WALLOWA
	Client Characteristics
	Gender: MALE 💌 * Disabled: NO 💌 *
	Ethnicity: HISPANIC/LATINO 💌 * Veteran: YES 💌 *
	Education: POST SECONDARY, NO DEGREE Language: SPANISH Homebound: Transport: NO
	Race (Check all that apply)*
	African American On't Know American Indian/Alaska Native Refused
	Asian
	Native Hawaiian or Pacific Islander Oregon Tribes White
	Non-Cash Benefits (Check all that apply)*
	SNAP Oregon Health Plan MEDICARE None WIC VA Med Serv TANF Child Care O Don't Know
	WIC VA Med Serv TANF Child Care O Don't Know TANF Trans Other TANF Public Rental Assist O Refused Other Health Ins Other Source Temp Rental Assist O Refused
(Income Does this client have any income? YES Save
	Data Classification: 3
	Oregon Housing and Community Services ©

Figure 2-15B: Client New Screen - HH member new

- Client name, birth date, SYSID/SSN is already filled in from being entered on the 'Client Search New' screen. Complete the rest of the new client information. *Fields marked with * require responses to be selected*. There are several buttons with dropdown arrows for different choices.
 - Title; salutation if necessary.
 - Legal first name, middle name, last name. *
 - Review social security number or system identification number for accuracy.
 - SSN Verification. * This is to describe if the SSN is full or 'don't know/don't have' or 'refuse' for system identification.
 - Client 'Comments' Box
 - One phone number, extension, and type.
 - Mailing Address: *

The first client created for a household, type their mailing address in provided boxes. For subsequent clients, the select from drop-down menu will display previous mailing addresses.

- Street number, Street direction: S, N, NE, NW, etc.
- Street name.
- Street type: Ave, Lane, etc.
- Unit type: Apt, Unit, PO Box, etc.
- Enter an apt number or PO Box number.
- City or Zip Code
- Gender *
- Disabled *
- Veteran *
- Ethnicity *
- Language.
- Education.
- Homebound
- Transportation (if Homebound set to 'YES')
- Race.*
- Oregon Tribe Option (if Native American has been selected)
- Non-Cash benefits client receives *
- Does this client have any income *

(None, Yes, None-Zero Income Statement, Don't Know, Refused).

If 'None-Zero Income Statement' is selected a required 'Zero Income Comment' block appears; otherwise it is hidden.

Click the 'Save' button.

OPUS Energy Assistance	Clie	ICY: OHCS Ent: KANG SON-O	F-AROK		Timeout:	TESTUSER 19:36 Log Out
	Client `	▼ Program ▼	Fiscal 🔻	Management Y	Reports V	Help 🔻
Client Search	Client Vie	W				Version 3.0.4T
View New Edit	Select Another Client		-OF-RYNAR	• Go		
Residence	Client Informatio	n				
View New	Name:	KANG SON-OF-AR	ок	SSN/SYS I	D# SKANG121213	
Edit		12-12-1913			je: 99	
Household	SSN Verification: Comments:	NO		Adult ID Verifie	07 YES	
View Mail/Ph Update NCB Update						<u>×</u>
Move Client to HH HH to Residence						•
Merge HH	Phone:		* Ext:	Type: C	ELL 💌 * 🗚	dd
Energy Education View						
Kit Component New	Mailing Address					
	999 PAGH ST ENTERPRISE, OR 97	828 County WALL	OWA			
	Client Characteris	stics				
	Gender:	MALE		Disabili	ty: NO	
		HISPANIC/LATINO			n: YES	
	Education: DEGREE	POST SECONDARY	r, no	Languag	Je: SPANISH	
	Homebound:	UNKNOWN		Rad	e: SINGLE	
	Oregon Tribe:					
	Edit Client Vie	w Household				
	Non-Cash Benefit	s				
	N SNAP N VA Med Serv		regon Health ANF Child Ca		N MEDICARE N TANF Trans	N WIC N Other TANF
	N Public Rental Ass		ther Health I		N Other Source	N Temp Rental Assist
	Payments - This I	Household (Sorte	ed by Name	then Auth #, cli	ck header to chai	nge secondary sort)
	Name Ar	mount C	hk No	Chk Date	Auth #	Type Status
	Payments - Previ	ous Household (S	Sorted by N	ame then Auth	#, click header to	change secondary sort)
	Income/Employe	r (Setting to Non	e, None - 7	ero Income. Do	n't Know or Refus	ed will delete all income)
	Does this client h			e. e meone, bo		and an address of meeting,
		•	1120		Save	
	Туре	Source/Er	np Mor	thly Annual	Verified Dat	te Last 30 Days Exclude
	New Income	١	Fotal	\$0.00 \$0.0	0	
	<u> </u>			•		Data Classification: 3
		Oregon H	ousing and	Community Serv	ices ©	

Figure 2-16: Client View - HH member added view

The 'Client View' screen will appear (*reference figure 2-16*). If changes need to be made, click the 'Client Edit' link in the left Nav Bar, or the 'Edit Client' button. Make the necessary changes, and click 'Save Changes' button. More clients can be added to the household as necessary by repeating the same steps. If all the clients have been added to the household, proceed to the 'Household View' screen to finish the client intake process, see next section for this process.

Where did the RED ICONS go???? (Active Client and Physical Residence)

The RED Icons have been replaced with the 'Client' display and the 'Residence' display at the top of the screen. The client shown indicates the last active client record added/accessed and the residence shows the active physical residence created for household. (*reference figure 2-17*).

OPUS Energy Assistance		Residence:	KOR SON-OF-RYN/ ENTERPRISE, OR 9		Mana	gemer	nt▼ R		out: 19	STUSER 9:53 og Out	Or	CON and Comm	munity Services
Client Search View New Edit		usehold V sehold - Click SSI	iew N/SYSID will open	n the Cli	ent Vie	w Scre	een. Hov	er ove	er code	for full	version		/ersion 3.0.4T
Residence	нн г	1embers					Bold Re	d elem	ents ind	icate poo	r data qu	ality	
View New	R	SSN/SYSID	Name		Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
Edit		SKOR092112	KOR SON-OF-RYNA	AR	101	м	PS	Y	N	RF	RF	Y	Y
Household View		SKANG121213	KANG SON-OF-ARC	ок	99	М	PS	Y	N	н	s	N	Y
Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH	To Sele	New Client Remove a Client (one at a time): Select client under the R column above, then Click this button Remove Client(s) from Household To Remove Household: Click this button Move Entire Household to Unknown											

Figure 2-17: Household View Screen - Red Icons

Client Vendor New

Setup:

On the 'Household View' screen, click the 'New Vendor' button in the Client-Vendor section (*reference figure 2-18*). The 'Client Vendor New' screen will appear (*reference figure 2-19*).

- Type or Select (*fields marked * are required*):
- Select the Applicant's name.
- Enter the Name on the Account (this may/may not be the Applicant).
- Client's Account number.
- Vendor Name.
- Verify by Intake Worker initials.
- Verification Date.
- Verification Type.
- Comments for Vendor, if needed.
- Click the Save button to save.

OPUS Energy Assistance							Management Reports Help Housing and Community Services								
Client Search View New															Version 3.0.4T
Edit	Hou	sehold -	Click SS	N/SYS	SID will	open the Cl	ient Vi	ew Scr	een. Hov	/er ov	er code	for full	version		
Residence View		1embers		-						· · · ·		· · ·	or data qu	-	
New Edit	R	SSN/S			Nan		Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
Household		SKORO		-	SON-OF		101	М	PS	Y	N	RF	RF	Y	Y
View Mail/Ph Update		SKANG:		KANG	S SON-O	F-AROK	99	М	PS	Y	N	н	S	N	Y
NCB Update		New Client													
Move Client to HH HH to Residence	Sele	To Remove a Client (one at a time): Remove Client(s) from Household Select client under the R column above, then Click this button Move Entire Household to Unknown													
Merge HH		·													
Energy Education	Pay	Payments - This Household (Sorted by Name then Auth #, click header to change seco									ndary so	ort) —			
Kit Component New	Nan	Name Amount Chk No Chk Date								Au	th #		Туре	Sta	atus
		Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort) Client Vendor (Vendors in red are expired) Income Summary													
	Ven		Туре	Pri	Acct#	Name/	Acct	r	KOR SON						\$3,000.00
6		v Vendo			Acct.	, nume,	Acci			01 101					\$5,000,00
									Househo	ld Sun	nmary				
	Add	ress							Total Inco	ome					\$3,000.00
	т	Addre	55						% of Pov	erty					19%
	м	999 PA	GH ST PRISE, O	R 9782	8				% of OMI						6%
	P		ORCHA A						Total # of	f Perso	ns				2
	Ľ	ENTER	PRISE, O	R 9782	8				НН Туре						▼ *
	□ Pho	1es							Househol	d Subsi	dized				
	Т	Number	r		Client	Name		_ [Mak	e any ch	nanges?	Save	Changes
	w	(503) 98				N-OF-RYNAF			HH Com	nents					
	2000 characters left (spaces count)									~					
														ata Cla	ssification
	Data Classification: 3 Oregon Housing and Community Services ©														

Figure 2-18: Household View Screen – New Vendor Button

OPUS Energy Assistanc	e	Residence	: KOR SON-OF : ENTERPRISE,	OR 97828		User: Timeout:	Orecon Housing and Community Services	
Client Search View New Edit Residence View New Edit Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH Energy Education View Kit Component New	Vendor In Nam Vendor/t Verificati Intake-V	nformation Client: he on Acct: Account # Heat Type: ion Worker: Th	iors if need	RYNAR RYNAR 8 SENERAL EL Date: 09-2	* (may/may not be	*		Version 3.0.4T
			Oregon H	ousing and	Community Service	s©		

Figure 2-19: Client Vendor New

The 'Household View' screen will re-appear with the vendor information entered in the Client Vendor section (*reference figure 2-20*). To add another vendor, click the 'New Vendor' button and repeat the setup steps listed above.

If all the vendor information is complete, proceed to the next section 'Household Summary'.

Household Summary

This section provides steps to complete the household summary section on the 'Household View' screen.

Setup:

There is one area on the 'Household View' screen (*reference figure 2-20*; the 'Household Summary' section has to be completed.

- Household Type drop-down list. This describes the composition of the household.
- HH Comments' should be used for any documentation related to household.

OPUS Energy Assistance											out: 19	ESTUSEF 9:46 og Out	Or	egon	
		Client	• Pr	rogra	m 🔻	Fiscal 🔻	Mana	geme	nt 🔻 🛛 🖡	Reports	5 *	lelp 🔻	Housing	and Com	nunity Services
Client Search View	Ho	usehol	d Vi	iew	,									Y	Version 3.0.4T
New Edit	Hou	sehold - Clic	k SSN/	SYSI	D will oj	pen the Cl	ient Vie	ew Scr	een. Ho	ver ove	er code	for full	version	. —	
Residence	нн	1embers							Bold Re	ed elem	ents ind	icate poo	or data qu	uality	
View New	R	SSN/SYS	D		Name	e	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
Edit		SKOR0921	12 K	KOR S	ON-OF-R	YNAR	101	М	PS	Y	N	RF	RF	Y	Y
Household View		SKANG1212	13 K	KANG S	SON-OF-	AROK	99	М	PS	Y	N	н	S	N	Y
Mail/Ph Update NCB Update		ew Client	ient (or	ne et s	time):		Remove Client(s) from Household								
Move Client to HH	Sele	To Remove a Client (one at a time): Select client under the R column above, then Click this To Remove Household: Click this button													
HH to Residence Merge HH	То	To Remove Household: Click this button							Movel	Entire	Housel	hold to	Unknow	'n	
Energy Education	Pay	Payments - This Household (Sorted by Name the							click he	ader t	o chang	je secoi	ndary so	ort) —	
Kit Component New	Nan	Name Amount Chk No C						k Date		Au	th #		Туре	Sta	atus
	Pay	Payments - Previous Household (Sorted by Nam						en Au	th #, clio	ck head	ler to c	hange s	seconda	ry sort)
	Clie	v t Vend or (V	endors	5 in re	d are e	xpired)			Income	Summa	ary —				
	Ven	dor	Туре	e Pri	Acct#	Name	e/Acct		KOR SON	I-OF-RY	NAR	_			\$3,000.00
	GEN	TLAND ERAL	E	Y	999-К0 97828	OR- KOR S	SON-OF		KANG SC	IN OF-A	ROK				\$1,200.00
		Vendor	I	<u> </u>	I				Househo	old Sun	ımary				
								1	Total Inc	ome					\$4,200.00
	Add	ress							% of Pov	erty					27%
	т	Address							% of OM	[9%
	м	999 PAGH ENTERPRIS		97828					Total # o	f Perso	ns				2
	Р	1701 VORO ENTERPRIS			3			NH	HH Type Househol	J. C. Lat		Co-F	labitants		
	Pho								louserio	u Subsi		e any ch	anges?	Save	Charges
	Т	Number		c	lient Na	ame		╶┐╟╴	HH Com	ments				/	
	w	(503) 988-88	888	ĸ	OR SON	I-OF-RYNAR									<u>^</u>
									2000		left (ere		-4)		Y
								L	2000 cha	acters	iert (spa	ices coul	-	ata Cl-	ssification: 3
				Ore	aon Hoi	using and	Commi	inity S	ervices /	5			U	ata Clà	ssincation: 3
Figure 2-20	Oregon Housing and Comm re 2-20: New Vendor section on the Household Vi									-					

'Note: Household Comments are shown in all Program Modules, regardless where entered. It is strongly suggested to enter the 'Date' followed by comments and completed by intake worker initials. This will allow future agency OPUS users to follow the record(s) when staff turn-over takes place. Click the 'Save' button. The Household View screen will "blink" while the database is saving the information, then the screen will remain steady.

Household - New Payment, Confirms Qualification

Ensure that you have an active Client and Residence prior to proceeding (*reference figure 2-17* red circled icons) otherwise you will get a general OPUS error and you will not be able to reach the screen (*reference figure 2-21*).



Figure 2-21: New Payment - Residence Error Message.

** NOTE: Check current year LIHEAP and OEAP Operations Manual for program requirements.

This process is to initiate a new payment. This step is only completed once <u>ALL</u> household, residence, income and vendor information has been verified and/or updated. The OPUS database calculates the income sources compared with formulas under the 'Payment New' screen and <u>confirms</u> that a household qualifies for program assistance.

- While in the 'Household View', using the top 'Main Menu'; scroll the mouse over 'Program' and down to 'New Payment' (*reference figure 2-22*). The 'Payment New' screen will appear.
- Select an APC for your agency = Agency/Program/County. APC Example: ACCESS-LP08-JAC-LIEAP 2008
- Click the 'Load' button (*reference figure 2-23*).

OPUS will load the agency's APC information with a program formula to calculate and match all household data with the program requirements. If a household qualifies or does not qualify for program requirements, an 'Accepted' or 'Denied' message will be displayed next to the 'Payment Eligibility Status' area (*reference figure 2-24*).

OPUS Energy Assistanc	e	Clien	y: OHCS t: KANG SON-OF-AROK e: ENTERPRISE, OR 978 Program ▼ Fiscal		Managemen	Time	eout:	TESTUSER 18:19 Log Out Help ▼	Housing and Community Services
Client Search View New Edit		Household	Payment New Search Payment SN/SYSID will open the	≥ ■ CI) ient View Scre	en. Hover ov	er co	de for full	Version 3.0.4T
Residence		HH Members				Bold Red elem	ents i	ndicate po	or data quality

Figure 2-22: Main menu - drop down options.

OPUS Energy Assistanc	ce	Client	: OHCS : KANG SON-O : ENTERPRISE,			User: TESTUSER Timeout: 17:55 Log Out Housing and Community Servi					
		Client 🔻	Program 🔻	Fiscal 🔻	Manageme	ent 🔻 🛛 Re	eports 🔻	Help 🔻	Trousing and		
Payment Search View New Edit	Paym Fields marke	ed * are requ	uired.							Version 3.0.4T	
	Client Nam KOR SON-OI KANG SON-O	F-RYNAR	Age Incor 101 \$3,00 99 \$1,20	0.00	Verified Y N	Adult ID Y Y	Paymen	t Other HH N N			
	APC CCN-	LP14-WAL-	LIHEAP 2014			•					
	Applicant I	nformation	1								
	Select Applic	ant KOR	SON-OF-RYNA	R 💌 *	Intake Date	10-29-20)13 🛄 (r	nm-dd-yyyy)*		
	HH Income	\$4,20	0.00		Intake Worke	r TNU	*				
	Eligible in HH	H 2			Subsidized	N					
	Energy Type		E		• * F	Refer for We	atherization	n			
	Overide Chil	ldren Blockir	ig 🗆		N	Non Energy	Services				
					E	Energy Relat	ted Advocad	y			
					L			(L	.oad		
									Data	a Classification: 3	
			Oregon H	ousing and	Community S	Services ©					

Figure 2-23: Payment New - APC Select and Load.

Once the household is accepted and can receive services (payment), complete a 'Payment New' by selecting or entering the following fields: (*fields marked * are required*):

- Applicant
- Intake Date (defaults to today's date but can be overridden if different)
- Your initials will be displayed in the Intake Worker's box can be overridden if actual intake worker is different from person inputting the data.
- Weatherization check box: check the box "if the household is recommended"
- Non-Energy Services
- Energy Related Advocacy
- Payment Type (Refer to program requirements)
- Energy Type
- Authorization numbers can be taken from the application, or if desired, OPUS will generate the authorization number automatically when the 'Save' button is activated (*reference figure 2-24*). The authorization number will be generated and it will be displayed on the 'Payment View' screen.

- Select Account Status for each vendor.
- Enter Dollar amount of assistance for each vendor (refer to program requirements for details on limitations).
- Override Child Blocking. (Selected only if child has been used during current in another Household).
- Click the 'Save' button to save payment information.

IMPORTANT: On the 'Payment New' or 'Payment Edit' screen, if changes are made to the APC, Override Child Blocking or Energy Type have been selected to create a new payment, be sure to re-click the **"Load"** button in order to re-qualify. Work through the New/Edit screen and save (*reference figure 2-24*). If all or part of payment is made to "Direct Pay" you are required to enter comments or you will not be able to save the payment.

OPUS Energy Assistance	e		: OHCS : KANG SON-O : ENTERPRISE				Oregon ()		
		Client 🔻	Program 🔻	Fiscal 🔻	Manageme	nt 🔻	Reports 🔻	Help 🔻	Housing and Community Services
Payment Search View New Edit	Payme Fields marke Client Name KOR SON-OF KANG SON-OF APC CCN-I Select Applic HI Income Eligible in HH Energy Type Overide Child	d * are requ -RYNAR)F-AROK LP14-WAL-I nformation ant KOR \$4,200 1	irred. Age Inco 101 \$3,00 99 \$1,20 IHEAP 2014 SON-OF-RYNA 0.00	10.00 10.00	Intake Date Intake Worker Subsidized	N efer for on Energ	*	acy	
	Payment Elig	ibility Statu	ACCEPTED						oad
	Payment In		\sim						
	Type Selec	ct Payment	Туре	*			Manu	al Auth#	
	Vendor		Amount	Account St	atus		Primary	Name on A Acct #	cct
	PORTLAND G	GENERAL	0.00 \$	CURRENT *	Γ	•		OR SON-OF-R	
	Direct Pay		0.00 \$	CURRENT	Г	•			
	Agency		0.00 \$	CURRENT		•			
	Comments	Tota	\$ 0.00			Balance	e \$ 0.00		
	2000 charact	ers left (spa	ices count)				Deny	/ Hold S	Save
ILLUIS /= Payment Ne	W - MICTO		Oregon H	ousing and	Community S	ervices	©		Data Classification: 3

Figure 2-24: Payment New Screen – Load Button and Eligibility Status

OPUS Energy Assistanc	Agency: OHCS User: TESTUSER Client: KANG SON-OF-AROK Timeout: 17:45 Residence: ENTERPRISE, OR 97828 Log Out Client ▼ Program ▼ Fiscal ▼ Management ▼ Reports ▼ Help ▼
Payment Search View New Edit	Version 3.0.4T Payment New Fields marked * are required. Client Name KOR SON-OF-RYNAR Age Income 101 \$3,000.00 SSN Verified Y Payment Other HH Y N Adult ID Y Payment Other HH Y N APC CCN-LP14-WAL-LIHEAP 2014 * Select Applicant KOR SON-OF-RYNAR * Select Applicant KOR SON-OF-RYNAR *
	HH Income \$4,200.00 Intake Worker INU * In this example; the 'Eligible in HH 2 Subsidized N Energy Type ELECTRIC * Refer for Weatherization V Overide Children Blocking Non Energy Services Energy Related Advocacy D By making this change, the 'Payment Information became inactive.
	Type Select Payment Type ▼* Manual Auth≠ Comments section and the 'Deny' 'Save'
	Vendor Amount Account Status Primary Name on Acct Outfons are deactivated.
	PORTLAND GENERAL 0.00 CURRENT YES
	Direct Pay 0.00 \$ CURRENT *
	Agency 0.00 S CORRENT *
	Total Sector Balance \$ 0.00
	2000 characters left (spaces count)
	Deny Hold Save Data Classification: 3 Oregon Housing and Community Services ©

Figure 2-25: Payment New – Any adjustments made, one section will disable.

Note: On the 'Payment New' screen, if there is an adjustment in the 'Applicant Information or in 'Payment Information' without loading a New APC or issuing a new payment, one of the two sections will disable (*reference figure 2-25*).

The 'Payment View' screen will appear next. Verify all information entered is correct. This step is considered to be a final review step for intake workers. The 'Payment View' screen displays the OPUS generated authorization number or the authorization number from the application.

OPUS Energy Assistance		Client	: OHCS :: KOR SON- :: ENTERPRI: Program	SE, OR 97	828	anagement 🔻		Jser: TESTUS cout: 11:00 Log O		Community Services			
Payment Search View New Edit Fiscal Edit	Payment View Version 3.0.4T APC: CCN-LP14-WAL-LIHEAP 2014 Edit Payment PAYMENT REPORTS Intake Disclaimer Notice of Action No Income Payment Receipt Intake Disclaimer Notice of Action No Income Note: Click on the blue diamond to view the report definitions. Many report definitions reference Attachment A. Click to view attachment.												
	Client Name KOR SON-OF-R KANG SON-OF-	YNAR AROK	Ag 1	e Inco 01 \$3,00 99 \$1,20	ne 0.00	SSN Verified Y Y		jult ID Y Y	ner HH N N				
	Applicant Info Name HH Income Eligible in HH Energy Type Non Energy Se Payment Info Payment Type Insert Date PORTLAND GE	rvices rmation Standa 10-29- Vendor	KOR SC \$4,200. 2 ELECTF N ard -2013	Amount \$480.00	Primary Y	Energy Relate Auth # Insert F	on Referral dren Block ad Advocad By Itus Stat	C16112659 TNU tus Nam	Subsidized	10-29-2013 TNU N N N Acct # 999-KOR-97828			
(Comments on Payment Det PORTLAND GEI Agency Paid	ails (by \		ending 0-29-2013 uthorized			atched atch #		Check: Check Da				

Figure 2-26: Payment View

The payment is now to be in "Pending Status", until management performs the payment authorization function. If edits need to be done on a payment, this can be done only when the payment is in "Pending Status". To edit, click the 'Edit Payment' button on the 'Payment View' screen. The payment detail section (at the bottom of screen) displays the batch number, check number and payment authorization number (*reference figure 2-25*).

You can access the Payment View screen from the Household View Screen or Main Menu [Program > Search > Payment] as often as needed to track the payment status dates from 'pending', 'authorized', 'batched', to the final 'agency paid' status.

Payment Links

The 'Household View' screen displays under the 'Payments' which the household receives assistance. A household may receive assistance from several programs or different time periods. For each program there is an associated payment link that displays a 'Payment View' screen. This concludes issuing a payment" to a qualified household who is eligible for program assistance in the LIEAP/OEA program (*reference figure 2-27*). The next section describes how to "**Deny a Payment**."

lame	Amount	Chk No	Chk Date	Auth #	Туре	Status
.P01	\$500.00			C40008331	Crisis	Void
LP02	\$500.00			C40008710	Furnace	Void
LP10	\$300.00	1111	06-08-2010	C40009950	Standard	Void
LP11	\$300.00	70868	01-20-2011	E111830 Standard		Agency Paid
010	±1.00			025202061	Consist	Maid
	\$1.00		-	c25303061	-	
		Household (S	Corted by Name the Chk Date			

Figure 2-27: Household View Payments

Denying a Payment

There may be times when an agency needs to "manually" deny a payment to a household, and process a denied payment. **Note:** All 'denied' payments need to have comments recorded in the comments section of the screen. The details as to "why the payment was denied should be recorded", (*reference figure 2-28*). It is strongly suggested to enter the 'Date' followed by comments and completed by intake worker initials. This will allow future agency OPUS users to follow the record(s) when staff-turn over takes place.

OPUS Energy Assistanc	e	Client	: OHCS : KANG SON-O : ENTERPRISE	OR 97828	Managaman		Timeou	r: TESTUSER t: 19:41 Log Out	Ore	Community Services				
		Client •	Program 🔻	Fiscal 🔻	Managemer	n •	Reports	Help 🔻						
Payment Search View	-	ent Ne								Version 3.0.4T				
New	Fields marked * are required.													
Edit	Client Nam KOR SON-O KANG SON-	F-RYNAR	Age Inco 101 \$3,00 99 \$1,20	0.00	Verified Y N	Adult I Y Y	D Payme	ent Other HH N N	I					
	APC CCN	I-LP14-WAL-	LIHEAP 2014			•	*							
	Applicant 1	Information	1											
	Select Appli	icant KOR	SON-OF-RYNA	\R ▼ *	Intake Date	10-29	-2013 🔳	(mm-dd-yyy	y)*					
	HH Income	\$4,200	0.00		Intake Worker	TNU	*							
	Eligible in H	Н 1			Subsidized	N								
	Energy Type	e	Г		· * Re	efer for	Weatherizat	ion	v					
		ildren Blockir	1		-		y Services							
			-				elated Advo	acv						
						iorgy in		-						
									Load					
			S: ACCEPTED											
		nformation	-											
	Type Sele	ect Payment	Гуре	*			Man	ual Auth#						
	Vendor		Amount	Account St	tatus		Primary	Name on						
	PORTLAND	GENERAL	0.00 \$		г	-	YES	Acct #	-					
	ELECTRIC		0.00	*	1	_	1	KOR SON-OF-	RYNAR					
							Ì							
								999-KOR-9782	28					
	Direct Pay		0.00 \$	CURRENT	Г	•	*							
				CURREN	Г	-	*							
	Agency		0.00 \$	CONTREIN										
	Comments	Tota	\$ 0.00	_		Balance	e \$ 0.00							
C (turn signed	applicat	ion				A					
	Cilenc c		curn signed	appiicat	1011.									
	2000 observe	cters left (spa	voor count)						7					
	2000 charac	cters iert (spa	ices count)				Den	y Hold	Save					
									Di	ata Classification: 3				
			Oregon H	ousing and	Community Se	ervices	©							

Figure 2-28: Payment New Screen - Deny a Payment with comments.

Setup:

- 1. Start on 'Payment New' screen and complete the steps in the topic "Household New Payment, Confirms Qualification".
- 2. Enter an authorization number, or allow OPUS to generate one by leaving it blank.
- 3. Enter comments about why a household is denied a payment.
- 4. At the end of the screen (Payment New), notice the "Deny" button next to the Save button

Note: On the Payment Edit screen, the 'Deny' button is located at the bottom-right side of the screen next to the 'Hold' button. Click the 'Deny' button. Once the Deny button is clicked, the Payment View screen will appear, (*reference figure 2-29*). If needed, a payment in "Deny" status can be edited on the 'Payment Edit' screen and the household re-qualified for program assistance.

OPUS Energy Assistan	ice Res	Agency: OHCS Client: KOR SON idence: ENTERPRI	SE, OR 97	828		_	Timeou		Ore	Community Services					
Payment Search View	Payment	nt • Program t View	▼ Fisca	I ▼ Ma	nagement v	r Rel	ports v	r Help ▼		Version 3.0.4T					
Edit	APC: CCN-L	P14-WAL-LIHEAP	2014						•	Edit Payment					
Luit	PAYMENT REPORTS														
	◆ Intake Report ◆ Intake Disclaimer ◆ Notice of Action ◆ No Income ◆														
	Payment Receipt														
	Note: Click on th	Note: Click on the blue diamond to view the report definitions.													
	Many report definitions reference Attachment A. Click to view attachment.														
	Client Name	A	ge Income SSN Ver			d	Adult	ID Pavr	ment Other HH						
	KOR SON-OF-RYN KANG SON-OF-AF	101 \$3,00 99 \$1,20	0.00	Y Y		Y Y			N N						
	Applicant Infor		+-,												
	Name		ON-OF-RYN	AR	Intake Date					10-29-2013					
	HH Income	\$4,200	.00		Intake Worker					TNU					
	Eligible in HH	2			Weatherization Referral Y			Sub	Subsidized N						
	Energy Type	ELECT	'RIC Override (Children Blocking Payments				N					
	Non Energy Servi	ices N	Energy R			ated Adv	ocacy		N						
	Decime and Tarfa m														
	Payment Inform	Standard			Auth	#	C16	5112659							
	Insert Date	10-29-2013		[Insert E		TNU								
	Ve	endor	Amount	Primary	Account S	tatus	Status	Name on	Acct	Acct #					
1	PORTLAND GENE	RAL ELECTRIC	\$.00	Y	CURRENT		Deny KOR SON-OF		-RYNAR 9999-KOR-97828						
		Tota	\$0.00	\$0.00											
	Comments on P	avment													
			_												
	Client did hot rett	urn signed applicatio	in.												
	Payment Detail	s (by Vendor)													
	PORTLAND GENE	RAL ELECTRIC	ending		Batched				÷						
	Agency Paid		1-06-2013 uthorized		Batch #				Check	Date					
	<u> </u>														
									Da	ta Classification: 3					
		Orego	n Housina	and Com	munity Servi	ces ©									

Figure 2-29: Payment View with Status as 'Deny'.

Household View

Household view provides an overview of the household view screen and instructions for completing the final steps for a household to receive program assistance.

Setup:

On the 'Client View' screen:

Use the 'Left Nav' bar, click the 'Household View' Link, the 'Household View' screen will appear or scroll over 'Client' in the top navigational bar and HH view will appear (*reference figure 2-30*). This screen is organized as follows:

- HH Members information top section
- Payments- below client section
- Vendors left side under payments section
- Income Summary right-side under payments section
- Household Summary right-side under income summary section
- Addresses left side under vendor section
- Phone numbers left side under address section
- HH Comments right-side under household summary section

In the 'Payment' section, under 'HH Members', energy assistance records the payments current and previous households have received listed by date. This screen is mainly a "view only" screen, except for the section in the middle of the screen: 'Household Summary' section. This section needs to be completed to qualify household for assistance.

OPUS Energy Assistance	e	Cli	nce: E	OR SC	ON-OF-RY PRISE, OI m ▼ F		Mana	geme	ent ▼ I		eout: 1	ESTUSER 9:38 .og Out Help ▼	Or	ECON and Com	munity Services			
Client Search View	Ho	useholo	1 V	iew					Version 3.0.4T									
New Edit	_ Hou	sehold - Clic	k SSN/	/SYSII	D will op	en the C	lient Vie	w Sc	reen. Ho	ver ove	er code	e for full	version	. —				
Residence	нн	Members							Bold R	ed elem	ents ind	licate poo	or data qu	uality				
View New	R	SSN/SYSI	D	Name A			Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income			
Edit	SKOR092112 K			KOR SO	101	М	PS	Y	N	RF	RF	Y	Y					
Household View		SKANG1212	13	KANG S	SON-OF-A	ROK	99	М	PS	Y	N	н	S	N	Y			
Mail/Ph Update NCB Update	N	ew Client																
Move	To Sel	Remove a Cli ect client unde	i ent (o r the R	ne at a colum	a time): n above,	then Clic	k this bu	ton	Remo	re Clie	ent(s) fr	om Hou	isehold					
Client to HH HH to Residence Merge HH	То	Remove Hou	seholo	d: Click	c this butt	on			Move	Entire	House	hold to	Unknow	'n				
Energy Education	_ Pay	ments - This	House	ehold ((Sorted	by Name	e then A	uth #	, click he	ader t	o chan	ge secor	ndary so	ort) —				
View Kit Component New	Nan	ne Am	ount		Chk No		Chk Date		Auth #			Туре	5	s	Status			
	LP14	\$0.	00						C16	112659		Stan	dard		Deny			
		monto Brou	ious H	lausal	ald (For	stad by	Name th	on A		-k hoay	danta	-hange e	acanda		、			
	Pay	ments - Prev	ious n	louser	1010 (301	rted by	Name th	en Al	Jth #, ch	к пеа	der to d	inange s	seconda	ry sort)			
	┌ Clie	nt Vendor (V	endor	s in re	d are ex	(pired)			Income	Summa	ary —							
	Ven	dor	Туре	e Pri	Acct#	Nan	ne/Acct		KOR SO	I-OF-RY	NAR				\$3,000.00			
		TLAND ERAL	Е	~	999-KO		SON-OF		KANG SC	N-OF-A	ROK				\$1,200.00			
	ELE	w Vendor	 -	<u> </u>	97828	RYN	AR		Househ	old Sun	nmary							
		w vendor							Total Inc	ome					\$4,200.00			
	Add	ress							% of Pov			:						
	Т	Address							% of OMI						9%			
	м	999 PAGH S ENTERPRIS		97828					Total # c	f Perso	ns				2			
	P	1701 VORC							НН Туре	ІН Туре		Co-Habitants			•			
	Ľ	ENTERPRIS	E, OR	97828					Household Subsidized									
	r Pho	nes									Mal	ce any ch	anges?	Save	Changes			
	Т	Number		C	lient Na	me			HH Com	ments					_			
	w	(503) 988-88	88	ĸ	OR SON-	OF-RYNA	R								<u> </u>			
															Y			
									2000 cha	racters	iert (sp	aces cour						
				0		-1	Comme	- 14 - 14					D	ata Cla	ssification:			
				Ure	yon Hou	sing and	Commu	nity s	Services (J								

Figure 2-30: HH View, Payments, Client Vendor Screen.

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