

## **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
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Kits Components	See Section 4
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*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

Client Search: Use the 'Client Search' screen to find current records in the OPUS database.

Client Search New: Use the 'Client Search New' screen during a client intake 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.

OPUS Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:48  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client Search**

Search Parameters (at least one field required)

SSN/SYSID:  Address:  Unit:  (ie Apt B)

First Name:  City:

Last Name:  Zip:  ☐ Show Residence Info. only

When you Click in Search Results:

[Client's SSN](#) = Household Screen  
[Client's Name](#) = Client Screen  
[Residence Address](#) = Residence Screen

A maximum of 100 results will be returned.

**Search**

Advanced Search

Data Classification: 3

Oregon Housing and Community Services ©

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



Agency: OHCS

User: TESTUSER  
Timeout: 19:48  
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 Merge HH
Energy Education View Kit Component New

### Client Search

Search Parameters (at least one field required)

SSN/SYSID:
Address:
Unit: (ie Apt B)

First Name: KOR
City:

Last Name: SON-OF-RYNAR
Zip:
☐ Show Residence Info. only

Search
Advanced Search

When you Click in Search Results:

Client's SSN = Household Screen

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-3A: Client Search Screen

Agency: OHCS

User: TESTUSER  
Timeout: 19:44  
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 Merge HH
Energy Education View Kit Component New

### Advanced Client Search

Search Parameters (at least one field required)

SSN/SYSID:

First Name:
Last Name:

Phone: 5039990000 (a portion of phone number, numbers only, no -)

Search

When you Click in Search Results:

Client's SSN = Household Screen

Client's Name or Phone Number = Client Screen

A maximum of 100 results will be returned.

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-3B: Advanced Client Search Screen

Agency: OHCS

User: TESTUSER  
Timeout: 19:57  
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  
Merge HH

Energy Education  
View  
Kit Component New

### Advanced Client Search

Version 3.0.4T

Search Parameters (at least one field required)

SSN/SYSID:

First Name:  Last Name:

Phone:  (a portion of phone number, numbers only, no -)

When you Click in Search Results:

Client's SSN = Household Screen  
Client's Name or Phone Number = Client Screen  
A maximum of 100 results will be returned.

Search Results			
SSN #	First Name	Last Name	Phone
SWORF040365	WORF	SON-OF-MOGH	503-999-0000

Data Classification: 3

Oregon Housing and Community Services ©

**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

Agency: OHCS

User: TESTUSER  
Timeout: 19:19  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client Search New**

New Client Information (Fields marked with \* are required, wildcards will be removed)

First Name: KOR \*  
Last Name: SON-OF-RYNAR \*  
SSN/Sys#: SKOR092112 \*  
DOB: 09-21-1912 (mm-dd-yyyy) \*

Create ID

Search

OPUS will search the database to find this client before creating a new record.

Data Classification: 3

Oregon Housing and Community Services ©

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.

## Client New

This step is only used after determining the client is not in the system and all 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

Agency: OHCS

User: TESTUSER  
Timeout: 17:44  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client Search New**

New Client Information (Fields marked with \* are required, wildcards will be removed)

First Name: KOR \* DOB: 09-21-1912 (mm-dd-yyyy) \*  
Last Name: SON-OF-RYNAR \*  
SSN/Sys#: [dropdown] \*  
Create ID Search

OPUS will search the database for existing client before creating a new record.

**Possible Pre-Existing Client Matches**

SSN #	First Name	Last Name	DOB
No Results Found			

Add New Member

Data Classification: 3

Oregon Housing and Community Services ©

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

2. 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.*



**Figure 2-5: Client New Screen.**

## Client View

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: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 19:39

Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client View**

Select Another Client in HH: KOR SON-OF-RYNAR Go

**Client Information**

Name: KOR SON-OF-RYNAR SSN/SYS ID#: SKOR092112  
DOB: 09-21-1912 Age: 101  
SSN Verification: YES Adult ID Verified? YES  
Comments:

Phone: 503-988-8888 Type: WORK Edit Delete  
Phone: \* Ext: Type: CELL \* Add

**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: UNKNOWN Race: REFUSED  
Oregon Tribe:  
Edit Client View Household

**Non-Cash Benefits**

N	SNAP	N	Oregon Health Plan	N	MEDICARE	N	WIC
N	VA Med Serv	N	TANF Child Care	N	TANF Trans	N	Other TANF
N	Public Rental Assist	N	Other Health Ins	N	Other Source	N	Temp Rental Assist

**Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)**

**Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income)**

Does this client have any income? YES Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
New Income	Total	\$0.00	\$0.00			

Data Classification: 3

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

Agency: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 19:39  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

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](#)

## Client View

Select Another Client in HH KOR SON-OF-RYNAR Go

**Client Information**

Name: KOR SON-OF-RYNAR      SSN/SYS ID# SKOR092112  
DOB: 09-21-1912      Age: 101  
SSN Verification: YES      Adult ID Verified? YES  
Comments:  
Phone: 503-988-8888    Type: WORK    Edit    Delete  
Phone:    \*    Ext:    Type: CELL    \*    Add

**Mailing Address**  
999 PAGH ST  
ENTERPRISE, OR 97828    County: WALLOWA

**Client Characteristics**  
Gender: MALE      Disability: NO  
Ethnicity: **REFUSED**      Veteran: YES  
Education: POST SECONDARY, NO DEGREE      Language: MAYAN GROUP  
Homebound: **UNKNOWN**      Race: **REFUSED**  
Oregon Tribe:  
Edit Client    View Household

**Non-Cash Benefits**

<input type="checkbox"/> SNAP	<input type="checkbox"/> Oregon Health Plan	<input type="checkbox"/> MEDICARE	<input type="checkbox"/> WIC
<input type="checkbox"/> VA Med Serv	<input type="checkbox"/> TANF Child Care	<input type="checkbox"/> TANF Trans	<input type="checkbox"/> Other TANF
<input type="checkbox"/> Public Rental Assist	<input type="checkbox"/> Other Health Ins	<input type="checkbox"/> Other Source	<input type="checkbox"/> Temp Rental Assist

**Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)**

**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 (spaces count)    Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
<span>New Income</span>	Total	\$0.00	\$0.00			

Data Classification: 3

Oregon Housing and Community Services ©

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 an 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 View**

Select Another Client in HH:

**Client Information**

Name: WORF SON-OF-MOGH SSN/SYS ID# SWORF040365  
DOB: 04-03-1965 Age: 48  
SSN Verification: YES Adult ID Verified? YES

Comments:

Phone: 503-999-0000 Type: CELL    
Phone:  \* Ext:  Type:  \*

**Mailing Address**

P.O. BOX 1701  
ENTERPRISE, OR 97828 County WALLOWA

**Client Characteristics**

**Left Nav Bar:**  
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

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.

Agency: OHCS  
Client: WORF SON-OF-MOGH  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:29  
Log Out

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

Version 3.0.4T

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

## Household Mail and Phone Update

Update Mailing Address for Household (Choose an address from menu, OR enter a new one below) \*

P.O. BOX 1701 - ENTERPRISE, OR, 97828  
RES - 1701 E FEDERATION WAY - ENTERPRISE, OR, 97828

physical location where they sleep under street name: e.g.,  
s post mile post marker 35 on Hwy 166.

Type

Direction

Unit

#

City

ST

Zip Code

+4

County

--Select One--

OR

--Select One--

Update Mailing Address

Modify Phones for Household (Add HH will add the phone to all clients in the household. Delete HH will delete all phone for all clients in the household.)

**WORF SON-OF-MOGH**

Phone: 503-999-0000    Type: CELL    Edit    Delete

Phone: 800-555-9422    Type: HOME    Edit    Delete

Phone:    Ext:    Type: CELL    Add    Add HH    Delete HH

**ALEXANDER ROZHENKO**

Phone: 800-555-9422    Type: HOME    Edit    Delete

Phone:    Ext:    Type: CELL    Add    Add HH    Delete HH

**K'EHLYR WORF**

Phone: 800-555-9422    Type: HOME    Edit    Delete

Phone:    Ext:    Type: CELL    Add    Add HH    Delete HH

**KURN SON-OF-MOGH**

Phone: 503-000-9999    Type: HOME    Edit    Delete

Phone:    Ext:    Type: CELL    Add    Add HH    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*)



## Client Non-Cash Benefits Update

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*).

Agency: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 18:14  
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  
Merge HH

Energy Education  
View  
Kit Component New

### Client View

Select Another Client in HH KOR SON-OF-RYNAR Go

**Client Information**

Name: KOR SON-OF-RYNAR SSN/SYS ID# SKOR092112  
DOB: 09-21-1912 Age: 101  
SSN Verification: YES Adult ID Verified? YES  
Comments:  
Phone: 503-988-8888 Type: WORK Edit Delete  
Phone: \* Ext: Type: CELL Add

**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: UNKNOWN Race: REFUSED  
Oregon Tribe:  
Edit Client View Household

**Non-Cash Benefits**

N SNAP	N Oregon Health Plan	N MEDICARE	N WIC
N VA Med Serv	N TANF Child Care	N TANF Trans	N Other TANF
N Public Rental Assist	N Other Health Ins	N Other Source	N Temp Rental Assist

**Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)**

**Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income)**  
Does this client have any income? YES  
Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
New Income	Total	\$0.00	\$0.00			

Data Classification: 3

Figure 2-9A: Client View Screen - Edit Client Button and Left Nav Bar Link

The Client Edit screen (reference figure 2-9B) should now appear. Go to the bottom of the screen where 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).

Agency: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 19:33  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

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

### Client Edit

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

Title

First Name KOR

Middle

Last Name SON-OF-RYNAR

Suffix

DOB 09-21-1912 (mm-dd-yyyy)\*

SSN/Sys# SKOR092112

Create ID

Adult Id Verified? ☒

SSN Verification YES

Comments

2000 characters left (spaces count)

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; ¼ miles past mile post marker 35 on Hwy 166.

No.	Direction	Street Name	Type	Direction Unit	#
999		PAGH	ST		

City ENTERPRISE-97828 ST OR Zip Code 97828-ENTERPRISE +4 County WALLAWA

Client Characteristics

Gender: MALE	Disabled: NO
Ethnicity: REFUSED	Veteran: YES
Education: POST SECONDARY, NO DEGREE	Language: MAYAN GROUP
Homebound:	Transport: NO

Race (Check all that apply)\*

☐ African American
☐ American Indian/Alaska Native
☐ Asian
☐ Native Hawaiian or Pacific Islander
☐ White
☐ Don't Know
☒ Refused

Oregon Tribes

Non-Cash Benefits (Check all that apply)\*

<input type="checkbox"/> SNAP	<input type="checkbox"/> Oregon Health Plan	<input checked="" type="checkbox"/> MEDICARE	<input type="radio"/> None
<input type="checkbox"/> WIC	<input checked="" type="checkbox"/> A Med Serv	<input type="checkbox"/> TANF Child Care	<input type="radio"/> Don't Know
<input type="checkbox"/> TANF Trans	<input type="checkbox"/> Other TANF	<input type="checkbox"/> Public Rental Assist	<input type="radio"/> Refused
<input checked="" type="checkbox"/> Other Health Ins	<input type="checkbox"/> Other Source	<input type="checkbox"/> Temp Rental Assist	

Save Changes

Data Classification: 3

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



Agency: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 19:51  
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  
Merge HH

Energy Education  
View  
Kit Component New

Client View

Version 3.0.4T

Select Another Client in HH KOR SON-OF-RYNAR Go

Client Information

Name: KOR SON-OF-RYNAR   SSN/SYS ID#: SKOR092112  
DOB: 09-21-1912   Age: 101  
SSN Verification: YES   Adult ID Verified? YES  
Comments:  
  
Phone: 503-988-8888   Type: WORK   Edit   Delete  
Phone:   \*   Ext:   Type: CELL \*   Add

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: UNKNOWN   Race: REFUSED  
Oregon Tribe:  
Edit Client   View Household

Non-Cash Benefits

N SNAP	N Oregon Health Plan	Y MEDICARE	N WIC
Y VA Med Serv	N TANF Child Care	N TANF Trans	N Other TANF
N Public Rental Assist	Y Other Health Ins	N Other Source	N Temp Rental Assist

Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)

Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income)

Does this client have any income? YES  
Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
New Income	Total	\$0.00	\$0.00			

Data Classification: 3

Oregon Housing and Community Services ©

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 Assistance

Agency: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 19:51  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client View

Select Another Client in HH: KOR SON-OF-RYNAR Go

#### Client Information

Name: KOR SON-OF-RYNAR SSN/SYS ID#: SKOR092112  
DOB: 09-21-1912 Age: 101  
SSN Verification: YES Adult ID Verified? YES  
Comments:

Phone: 503-988-8888 Type: WORK Edit Delete  
Phone: \* Ext: Type: CELL Add

#### 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: UNKNOWN Race: REFUSED  
Oregon Tribe:

Edit Client View Household

#### Non-Cash Benefits

N	SNAP	N	Oregon Health Plan	Y	MEDICARE	N	WIC
Y	VA Med Serv	N	TANF Child Care	N	TANF Trans	N	Other TANF
N	Public Rental Assist	Y	Other Health Ins	N	Other Source	N	Temp Rental Assist

#### Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

#### Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

#### Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income)

Does this client have any income? YES Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
New Income	Total	\$0.00	\$0.00			

Data Classification: 3

Oregon Housing and Community Services ©

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)              |

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: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 18:40  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Income & Employer New

Income (Fields marked with \* are required.)

Source: STATE OF OREGON  
Type: UNEMPLOYMENT  
Amount: 250.00 \* Frequency: Monthly \*  
Verified How: Check Pay Stub \* Verified By: TNU \* Verified Date: 09-28-2012 (mm-dd-yyyy) \*  
Income received in past 30 days? ☒ Don't use this record when creating Payments? ☐  
Comments  
2000 characters left (spaces count)

Employer Information

Phone: Ext: Address 1: Address 2: City, State Zip

**Save**

Data Classification: 3

Oregon Housing and Community Services ©

**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).

Agency: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 19:39  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

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

## Client View

Select Another Client in HH KOR SON-OF-RYNAR Go

**Client Information**

Name: KOR SON-OF-RYNAR      SSN/SYS ID# SKOR092112  
DOB: 09-21-1912      Age: 101  
SSN Verification: YES      Adult ID Verified? YES  
Comments:  
Phone: 503-988-8888    Type: WORK    Edit Delete  
Phone:    \*    Ext:    Type: CELL    +    Add

**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: **UNKNOWN**      Race: **REFUSED**  
Oregon Tribe:  
Edit Client View Household

**Non-Cash Benefits**

N	SNAP	N	Oregon Health Plan	Y	MEDICARE	N	WIC
Y	VA Med Serv	N	TANF Child Care	N	TANF Trans	N	Other TANF
N	Public Rental Assist	Y	Other Health Ins	N	Other Source	N	Temp Rental Assist

**Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)**

**Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income)**  
Does this client have any income? YES Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
UNEMPLOYMENT	STATE OF OREGON	\$250.00	\$3,000.00	09-28-2012	Y	N
<span>New Income</span>	Total	\$250.00	\$3,000.00			

Data Classification: 3

Oregon Housing and Community 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 *cannot* 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 [opushelp@hcs.state.or.us](mailto:opushelp@hcs.state.or.us).

## 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

Agency: OHCS User: TESTUSER Timeout: 19:58 Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client Search**

Search Parameters (at least one field required)

SSN/SYSID: Address: %VORCHA Unit: (ie Apt B)  
 First Name: City: ENTERPRISE  
 Last Name: Zip: ☐ Show Residence Info. only

When you Click in Search Results: Search  
 Client's SSN = Household Screen Advanced Search  
 Client's Name = Client Screen  
 Residence Address = Residence Screen  
 A maximum of 100 results will be returned.

**Search Results**

No Results Found

SSN #	First Name	Last Name	Birth Year	Address	Unit	City
No Results Found						

Data Classification: 3

Oregon Housing and Community Services ©

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

**OPUS**  
Energy Assistance

Agency: OHCS User: TESTUSER Timeout: 18:29 Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Residence New**

Physical Address

PO Box is not a valid residence 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; ¼ miles past mile post marker 35 on Hwy 166.

No. 1701 Direction Street Name VORCHA Type AVE Direction Unit #  
 City ENTERPRISE-97828 St. OR 97828-ENTERPRISE County WALLAWA

**Residence Info**

Residence Type MFD/Mobile Residence Status Rent (Heat not)

**Energy Sources (\*)** - At least one source of energy must be selected.

☒ Electric ☐ Wood Primary Source ELECTRIC  
☐ Natural Gas ☐ Pellet  
☐ Oil ☐ Solar  
☐ Liquid Gas ☐ Other

Save

Data Classification: 2

Oregon Housing and Community Services ©

**Figure 2-13A:** Residence New Screen

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

Agency: OHCS

User: TESTUSER  
Timeout: 19:49  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.3P

**Client Search New**

New Client Information (Fields marked with \* are required, wildcards will be removed)

First Name:  \* DOB:  \* (mm-dd-yyyy) \*

Last Name:  \* Create ID

SSN/Sys#:  \* Search

OPUS will search the database to find this client before creating a new record.

Possible Pre-Existing Client Matches

SSN #	First Name	Last Name	DOB
No Results Found			

Add New Member

Data Classification: 3

Oregon Housing and Community Services ©

**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 two exceptions 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

User: TESTUSER  
Timeout: 19:36  
Log Out

Client Program Fiscal Management Reports Help

**Household View**

Household - Click SSN/SYSID will open the Client View Screen. Hover over code for full version.

HH Members										Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SKOR092112	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y

**New Client**

To Remove Household: Click this button **Move Entire Household to Unknown**

**Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)**

Vendor	Type	Pri	Acct#	Name/Acct
<b>New Vendor</b>				

**Income Summary**

KOR SON-OF-RYNAR	\$3,000.00
------------------	------------

**Household Summary**

Total Income	\$3,000.00
% of Poverty	26%
% of OMI	8%
Total # of Persons	1
HH Type	<input type="text"/>
Household Subsidized	<input type="checkbox"/>

**Address**

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828

**Phones**

T	Number	Client Name
W	(503) 988-8888	KOR SON-OF-RYNAR

**HH Comments**

2000 characters left (spaces count)

**Data Classification: 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.

The screenshot displays the OPUS Energy Assistance web application interface. At the top, the header includes the OPUS logo, agency information (OHCS, Client: KOR SON-OF-RYNAR), user details (User: TESTUSER, Timeout: 19:54), and a 'Log Out' button. A navigation bar contains tabs for Client, Program, Fiscal, Management, Reports, and Help. The left sidebar lists various actions: 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), and Energy Education (View, Kit Component New). The main content area is titled 'Client Search New' and includes a 'Current Household Members' table with one entry: KOR SON-OF-RYNAR, Male, 101. Below this is the 'New Client Information' section, which contains input fields for First Name (KANG), Last Name (SON-OF-AROK), and SSN/Sys# (SKANG121213), along with a Date of Birth (DOB) field set to 12-12-1913. A 'Create ID' button is next to the DOB field. A 'Search' button is located at the bottom right of the form. A note states: 'OPUS will search the database to find this client before creating a new record.' Below the search fields is a 'Possible Pre-Existing Client Matches' section, which currently shows 'No Results Found'. A red circle highlights the 'Add New Member' button at the bottom right of the form. The footer of the page includes the text 'Oregon Housing and Community Services' and 'Data Classification: 3'.

Name	Gender	Age
KOR SON-OF-RYNAR	M	101

First Name	Last Name	DOB	SSN/Sys#
KANG	SON-OF-AROK	12-12-1913	SKANG121213

**Add New Member**

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

## Add Clients to Household (continued)

Agency: OHCS  
Client: KOR SON-OF-RYNAR

User: TESTUSER  
Timeout: 17:55  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

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

### Client New

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

Title

First Name \* KANG

Middle

Last Name \* SON-OF-AROK

Suffix

DOB 12-12-1913 (mm-dd-yyyy) \*

SSN/Sys# SKANG121213 \*

Create ID

Adult Id Verified? ☒

SSN Verification NO \*

Comments

2000 characters left (spaces count)

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; ¼ miles past mile post marker 35 on Hwy 166.

No.	Direction	Street Name	Type	Direction	Unit	#
1701		MORCHA	AVE		UNIT	5

City ENTERPRISE-97828

ST

Zip Code 97828-ENTERPRISE

+4

County WALLAWA

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

☐ American Indian/Alaska Native

☐ Asian

☒ Native Hawaiian or Pacific Islander

☐ White

☐ Don't Know

☐ Refused

Oregon Tribes

Non-Cash Benefits (Check all that apply) \*

☐ SNAP

☐ Oregon Health Plan

☐ MEDICARE

☐ WIC

☐ VA Med Serv

☐ TANF Child Care

☐ TANF Trans

☐ Other TANF

☐ Public Rental Assist

☐ Other Health Ins

☐ Other Source

☐ Temp Rental Assist

☐ None

☐ Don't Know

☐ 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

2. 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.

Agency: OHCS  
Client: KANG SON-OF-AROK

User: TESTUSER  
Timeout: 19:36  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

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

### Client View

Select Another Client in HH

**Client Information**

Name: KANG SON-OF-AROK      SSN/SYS ID# SKANG121213  
DOB: 12-12-1913      Age: 99  
SSN Verification: NO      Adult ID Verified? YES  
Comments:   
Phone:  \* Ext:  Type:  \*

**Mailing Address**

999 PAGH ST  
ENTERPRISE, OR 97828    County: WALLOWA

**Client Characteristics**

Gender: MALE      Disability: NO  
Ethnicity: HISPANIC/LATINO      Veteran: YES  
Education: POST SECONDARY, NO      Language: SPANISH  
DEGREE  
Homebound: UNKNOWN      Race: SINGLE  
Oregon Tribe:

**Non-Cash Benefits**

<input type="checkbox"/> SNAP	<input type="checkbox"/> Oregon Health Plan	<input type="checkbox"/> MEDICARE	<input type="checkbox"/> WIC
<input type="checkbox"/> VA Med Serv	<input type="checkbox"/> TANF Child Care	<input type="checkbox"/> TANF Trans	<input type="checkbox"/> Other TANF
<input type="checkbox"/> Public Rental Assist	<input type="checkbox"/> Other Health Ins	<input type="checkbox"/> Other Source	<input type="checkbox"/> Temp Rental Assist

**Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)**

**Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income)**

Does this client have any income?

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
<input type="button" value="New Income"/>	Total	\$0.00	\$0.00			

Data Classification: 3

Oregon Housing and Community Services ©

**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

Agency: OHCS  
Client: KOR SON-OF-RYNAR  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:53  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Household View

Household - Click SSN/SYSID will open the Client View Screen. Hover over code for full version.

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SKOR092112	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>	SKANG121213	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	N	Y

**Bold Red elements indicate poor data quality**

New Client

To Remove a Client (one at a time):  
Select client under the R column above, then Click this button

To Remove Household: Click this button

Remove Client(s) from Household

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.

Agency: OHCS  
Client: KOR SON-OF-RYNAR  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:52  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

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

## Household View

Household - Click SSN/SYSID will open the Client View Screen. Hover over code for full version.

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SKOR092112	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	SKANG121213	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	N	Y	

**New Client**

To Remove a Client (one at a time):  
Select client under the R column above, then Click this button

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

**Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)**

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

**Client Vendor (Vendors in red are expired)**

Vendor	Type	Pri	Acct#	Name/Acct
<b>New Vendor</b>				

**Income Summary**

KOR SON-OF-RYNAR	\$3,000.00
------------------	------------

**Address**

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828
P	1701 VORCHA AVE SPC 3 ENTERPRISE, OR 97828

**Phones**

T	Number	Client Name
W	(503) 988-8888	KOR SON-OF-RYNAR

**Household Summary**

Total Income	\$3,000.00
% of Poverty	19%
% of OMI	6%
Total # of Persons	2
HH Type	<input type="text"/>
Household Subsidized	<input type="checkbox"/>

Make any changes? **Save Changes**

**HH Comments**
2000 characters left (spaces count)

Data Classification: 3

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

Agency: OHCS  
Client: KOR SON-OF-RYNAR  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 18:57  
Log Out

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

Version 3.0.4T

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

## Client Vendor New

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

Client: KOR SON-OF-RYNAR \*

Name on Acct: KOR SON-OF-RYNAR \* (may/may not be same as Client)

Account #: 999-KOR-97828

Vendor/Heat Type: PORTLAND GENERAL ELECTRIC / Electric \*

Verification

Intake-Worker: TNU Date: 09-28-2012 (mm-dd-yyyy) Type: Copy of Bill

Comments

Comments for vendors if needed.

1969 characters left (spaces count)

Save

Data Classification: 3

Oregon Housing and Community Services ©

**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**

Agency: OHCS  
Client: KANG SON-OF-AROK  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:46  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Household View

Household - Click SSN/SYSID will open the Client View Screen. Hover over code for full version.

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SKOR092112	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>	SKANG121213	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	N	Y

**New Client**

To Remove a Client (one at a time):  
Select client under the R column above, then Click this button

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

#### Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

#### Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
------	--------	--------	----------	--------	------	--------

#### Client Vendor (Vendors in red are expired)

Vendor	Type	Pri	Acct#	Name/Acct
PORTLAND GENERAL ELECTRIC	E	Y	999-KOR-97828	KOR SON-OF-RYNAR

**New Vendor**

#### Income Summary

Client	Income
KOR SON-OF-RYNAR	\$3,000.00
KANG SON-OF-AROK	\$1,200.00

#### Household Summary

Total Income	\$4,200.00
% of Poverty	27%
% of OMI	9%
Total # of Persons	2
HH Type	Co-Habitants
Household Subsidized	<input type="checkbox"/>

Make any changes? **Save Changes**

#### HH Comments

2000 characters left (spaces count)

**Data Classification: 3**

Oregon Housing and Community Services ©

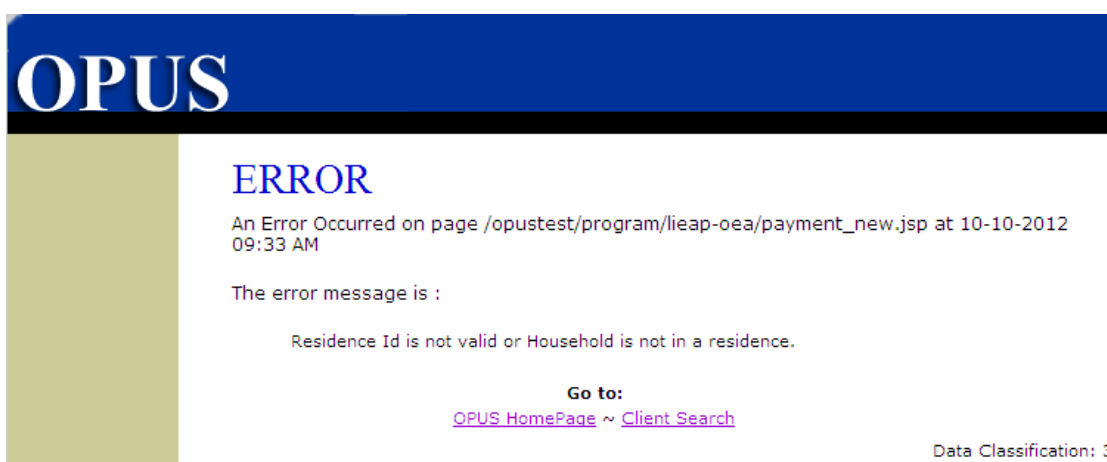
Figure 2-20: New Vendor section on the Household View Screen.



**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 ALL 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 confirms 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*).

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

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**

Agency: OHCS      User: TESTUSER  
 Client: KANG SON-OF-AROK      Timeout: 19:41  
 Residence: ENTERPRISE, OR 97828      Log Out

Client   Program   Fiscal   Management   Reports   Help

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**Payment New**

Fields marked \* are required.

Client Name	Age	Income	SSN Verified	Adult ID	Payment Other HH
KOR SON-OF-RYNAR	101	\$3,000.00	Y	Y	N
KANG SON-OF-AROK	99	\$1,200.00	N	Y	N

APC: CCN-LP14-WAL-LIHEAP 2014 \*

**Applicant Information**

Select Applicant: KOR SON-OF-RYNAR \*      Intake Date: 10-29-2013 (mm-dd-yyyy) \*

HH Income: \$4,200.00      Intake Worker: TNU \*

Eligible in HH: 1      Subsidized: N

Energy Type: ELECTRIC \*      Refer for Weatherization: ☒ **Load**

Override Children Blocking: ☐      Non Energy Services: ☐  
 Energy Related Advocacy: ☐

Payment Eligibility Status: **ACCEPTED**

**Payment Information**

Type: Select Payment Type \*      Manual Auth#

Vendor	Amount	Account Status	Primary	Name on Acct
PORTLAND GENERAL ELECTRIC	0.00 \$	CURRENT	YES	KOR SON-OF-RYNAR
Direct Pay	0.00 \$	CURRENT *		999-KOR-97828
Agency	0.00 \$	CURRENT *		
<b>Total</b>	<b>\$ 0.00</b>			<b>Balance \$ 0.00</b>

**Comments**

2000 characters left (spaces count)

Deny   Hold   **Save**      Data Classification: 3

Oregon Housing and Community Services ©

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

Agency: OHCS  
Client: KANG SON-OF-AROK  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 17:45  
Log Out

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

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Payment  
Search  
View  
New  
Edit

## Payment New

Fields marked \* are required.

Client Name	Age	Income	SSN Verified	Adult ID	Payment Other HH
KOR SON-OF-RYNAR	101	\$3,000.00	Y	Y	N
KANG SON-OF-AROK	99	\$1,200.00	Y	Y	N

APC: CCN-LP14-WAL-LIHEAP 2014 \*

### Applicant Information

Select Applicant: KOR SON-OF-RYNAR \* Intake Date: 10-29-2013 (mm-dd-yyyy) \*

HH Income: \$4,200.00 Intake Worker: TNU \*

Eligible in HH: 2 Subsidized: N

Energy Type: ELECTRIC \* Refer for Weatherization: ☒

Override Children Blocking: ☐ Non Energy Services: ☐

Energy Related Advocacy: ☐

Load

Payment Eligibility Status: ACCEPTED

### Payment Information

Type: Select Payment Type \* Manual Auth#

Vendor	Amount	Account Status	Primary	Name on Acct
PORTLAND GENERAL ELECTRIC	0.00 \$	CURRENT	YES	KOR SON-OF-RYNAR
Direct Pay	0.00 \$	CURRENT		999-KOR-97828
Agency	0.00 \$	CURRENT		
Total	\$ 0.00			Balance \$ 0.00

Comments

2000 characters left (spaces count)

Deny Hold Save

In this example; the 'Eligible in HH' number was changed to '2'.

By making this change, the 'Payment Information' became inactive.

The drop-down arrows, comments section and the 'Deny' 'Save' buttons are deactivated.

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.

Agency: OHCS  
Client: KOR SON-OF-RYNAR  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 11:00  
Log Out

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

Version 3.0.4T

## Payment View

APC: CCN-LP14-WAL-LIHEAP 2014
Edit Payment

PAYMENT REPORTS

Intake Report Intake Disclaimer Notice of Action No Income

Payment Receipt

Note: Click on the blue diamond to view the report definitions.  
Many report definitions reference Attachment A. Click to view attachment.

Client Name	Age	Income	SSN Verified	Adult ID	Payment Other HH
KOR SON-OF-RYNAR	101	\$3,000.00	Y	Y	N
KANG SON-OF-AROK	99	\$1,200.00	Y	Y	N

Applicant Information

Name	KOR SON-OF-RYNAR	Intake Date	10-29-2013
HH Income	\$4,200.00	Intake Worker	TNU
Eligible in HH	2	Weatherization Referral Y	Subsidized N
Energy Type	ELECTRIC	Override Children Blocking Payments	N
Non Energy Services	N	Energy Related Advocacy	N

Payment Information

Payment Type	Standard	Auth #	C16112659
Insert Date	10-29-2013	Insert By	TNU

Vendor	Amount	Primary	Account Status	Status	Name on Acct	Acct #
PORTLAND GENERAL ELECTRIC	\$480.00	Y	CURRENT	Pending	KOR SON-OF-RYNAR	999-KOR-97828
<b>Total</b>	\$480.00					

Comments on Payment

Payment Details (by Vendor)

PORTLAND GENERAL ELECTRIC	Pending	Batched	Check #
	10-29-2013		
Agency Paid	Authorized	Batch #	Check Date

Data Classification: 3

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.**”

Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)						
Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LP01	\$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
LP12	\$1.00			C25303061	Special	Void

Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)						
Name	Amount	Chk No	Chk Date	Auth #	Type	Status
OEAP12 PG	\$250.00			C40028617	Crisis	Deny

 Payment Link
  Authorization #
  Payment Status

**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.

Agency: OHCS  
Client: KANG SON-OF-AROK  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:41  
Log Out

Client ▼ Program ▼ Fiscal ▼ Management ▼ Reports ▼ Help ▼

Payment  
Search  
View  
New  
Edit

## Payment New

Fields marked \* are required.

Client Name	Age	Income	SSN Verified	Adult ID	Payment Other HH
KOR SON-OF-RYNAR	101	\$3,000.00	Y	Y	N
KANG SON-OF-AROK	99	\$1,200.00	N	Y	N

APC: CCN-LP14-WAL-LIHEAP 2014 \*

### Applicant Information

Select Applicant: KOR SON-OF-RYNAR \* Intake Date: 10-29-2013 (mm-dd-yyyy) \*

HH Income: \$4,200.00 Intake Worker: TNU \*

Eligible in HH: 1 Subsidized: N

Energy Type: ELECTRIC \* Refer for Weatherization: ☒

Override Children Blocking: ☐ Non Energy Services: ☐

Energy Related Advocacy: ☐

Load

Payment Eligibility Status: ACCEPTED

### Payment Information

Type: Select Payment Type \* Manual Auth#

Vendor	Amount	Account Status	Primary	Name on Acct
PORTLAND GENERAL ELECTRIC	0.00 \$	CURRENT	YES	KOR SON-OF-RYNAR
Direct Pay	0.00 \$	CURRENT		999-KOR-97828
Agency	0.00 \$	CURRENT		
<b>Total</b>	<b>\$ 0.00</b>			<b>Balance \$ 0.00</b>

### Comments

Client did not return signed application.

2000 characters left (spaces count)

Deny Hold Save

Data Classification: 3

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.



Agency: OHCS  
Client: KOR SON-OF-RYNAR  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 16:28  
Log Out

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

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

## Payment View

APC: CCN-LP14-WAL-LIHEAP 2014

PAYMENT REPORTS

Intake Report
Intake Disclaimer
Notice of Action
No Income

Payment Receipt

Note: Click on the blue diamond to view the report definitions.  
Many report definitions reference Attachment A. Click to view attachment.

Client Name	Age	Income	SSN Verified	Adult ID	Payment Other HH
KOR SON-OF-RYNAR	101	\$3,000.00	Y	Y	N
KANG SON-OF-AROK	99	\$1,200.00	Y	Y	N

**Applicant Information**

Name	KOR SON-OF-RYNAR	Intake Date	10-29-2013
HH Income	\$4,200.00	Intake Worker	TNU
Eligible in HH	2	Weatherization Referral Y	Subsidized N
Energy Type	ELECTRIC	Override Children Blocking Payments	N
Non Energy Services	N	Energy Related Advocacy	N

**Payment Information**

Payment Type	Standard	Auth #	C16112659
Insert Date	10-29-2013	Insert By	TNU

Vendor	Amount	Primary	Account Status	Status	Name on Acct	Acct #
PORTLAND GENERAL ELECTRIC	\$0.00	Y	CURRENT	Deny	KOR SON-OF-RYNAR	999-KOR-97828
<b>Total</b>	\$0.00					

**Comments on Payment**

Client did not return signed application.

**Payment Details (by Vendor)**

PORTLAND GENERAL ELECTRIC	Pending 11-06-2013	Batched	Check#
Agency Paid	Authorized	Batch #	Check Date

Data Classification: 3

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.

Agency: OHCS  
Client: KOR SON-OF-RYNAR  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:38  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

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

## Household View

Household - Click SSN/SYSID will open the Client View Screen. Hover over code for full version.

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SKOR092112	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	SKANG121213	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	N	Y	

New Client

To 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

### Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LP14	\$0.00			C16112659	Standard	Deny

### Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)

#### Client Vendor (Vendors in red are expired)

Vendor	Type	Pri	Acct#	Name/Acct
PORTLAND GENERAL ELECTRIC	E	Y	999-KOR-97828	KOR SON-OF-RYNAR

New Vendor

#### Income Summary

KOR SON-OF-RYNAR	\$3,000.00
KANG SON-OF-AROK	\$1,200.00

#### Household Summary

Total Income	\$4,200.00
% of Poverty	27%
% of OMI	9%
Total # of Persons	2
HH Type	Co-Habitants *
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

#### Address

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828
P	1701 VORCHA AVE SPC 3 ENTERPRISE, OR 97828

#### Phones

T	Number	Client Name
W	(503) 988-8888	KOR SON-OF-RYNAR

#### HH Comments

2000 characters left (spaces count)

Data Classification: 3

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

**THIS  
PAGE  
LEFT  
BLANK**