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 | Agence Client ▼ | y: OHCS Program ▼ | Fiscal 🔻 | Management 🔻 | User: TESTUSER Timeout: 19:50 Log Out Reports 	Help | | | | | |
|--|---|--|-------------------------------------|--|--|------------------------|----------|----------------|--|--|
| 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 | ch s (at least one fi DF-RYNAR search Results: hold Screen t Screen Residence Screen sults will be return | ield require Ad Sea Advand | ed) dress: City: Zip: Zip: ch ced Search | Show Res | Uni sidence Info. o | it: | (ie Apt B) | | |
| HH to Residence Merge HH | | | | Search Results | 5 | | | | | |
| 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 | e Ager | cy: OHCS | | | User: TEST Timeout: 19:4 Log | s Out Housing and Community Services |
|--|--|--|---------------------|--------------------------|------------------------------------|---|
| | Client | Program 🔻 | Fiscal 🔻 | Management 🔻 | Reports 🔻 Hel | |
| Client Search View New | Client Sea | rch | | | | Version 3.0.4T |
| Edit | Search Paramete | rs (at least one | field require | ed) | | |
| Residence View New Edit | SSN/SYSID: First Name: KOR Last Name: SON | OF-RYNAR | Ac | ldress: City: Zip: | Show Residence | Unit: (ie Apt B) |
| Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH | When you Click in <u>Client's SSN</u> = Hous <u>Client's Name</u> = Clie <u>Residence Address</u> = A maximum of 100 r | Search Results: shold Screen nt Screen s Residence Scree esults will be retu | Advan n rned. | rch ced Search | | |
| Energy Education View Kit Component New | | | | | | |
| | | | | | - | Data Classification: 3 |
| | | Oregon H | lousing and | Community Service | es © | |

Figure 2-3A: Client Search Screen

| Client Program Fiscal Management Reports Help Client Search Search View Search Parameters (at least one field required) SSN/SYSID: Image: | OPUS Energy Assistance | Agency: OHCS | User: TESTUSER Timeout: 19:44 Log Out Housing and Community Services |
|--|--|--|---|
| Oregonal University of Community Company of | 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 • Program • Fiscal • Management Advanced Client Search Search Parameters (at least one field required) SSN/SYSID: First Name: Last Name: Phone 5039990000 (a)portion of phone number, number 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. | Version 3.0.4T |
| Oregon Housing and Community Services © | | Oregon Housing and Community Serv | ices © |

Figure 2-3B: Advanced Client Search Screen

| OPUS Energy Assistance | Cli | Agency: O⊦ ent ▼ Pre | ICS ogram ▼ Fis | cal 🔻 Manag | jement 🔻 | 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 | Advanced Client Search Version Search Parameters (at least one field required) | | | | | | | | |
| 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 | | | | | |
| Kit Component New | | | | | | | | Data Classification: 3 | |
| | | | Oregon Housir | ng and Commu | nity 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 | CHCS | | | User: Timeout: | TESTUSER 19:19 Log Out | Orecon |
|--|-------------|--------------|-------------------------------|-----------------|---------------------|-------------------|------------------------------|--------------------------------|
| \frown | | Client 🔻 | Program 🔻 | Fiscal 🔻 | Management * | ▼ Reports ▼ | Help 🔻 | Housing and community services |
| Client Search View | Clien | t Searc | ch New | | | | | Version 3.0.4T |
| New Edit | New Clier | nt Informa | tion (Fie <mark>lds</mark> ma | arked with * | are required, | wildcards will be | e removed |) |
| Residence | First Name | F | KOR | | * | DOB 09-21-19 | 12 🛄 (| mm-dd-yyyy)* |
| New | Last Name | <u></u> | SON-OF-RYNAF | २ | 2 | Create | ID | |
| Edit | SSN/Sys# | 5 | SKOR092112 | * | | | | Search |
| View Mail/Ph Update NCB Update | OPUS will s | earch the da | atabase to find tl | 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 |
| | 1 | | 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 | Agency: OHCS | | User: TESTUSER Timeout: 17:44 Log Out Housing and Community | ervices |
|--|--|-------------------------------|--|----------|
| Client Search View | Client Search New | • Management • Kej | Version | 3.0.4T |
| New Edit | New Client Information (Fields marked w | h* are required, wildcar | ds will be removed) | |
| Residence View | First Name KOR | * DOB | 09-21-1912 (mm-dd-yyyy)* | |
| New Edit | Last Name SON-OF-RYNAR | * | Create ID | |
| Household View Mail/Ph Update | SSN/Sys# * OPUS will search the da client | before creating a new record. | 562 | arch |
| NCB Update | Possible Pre-Existing Client Matches | | | |
| Client to HH HH to Residence Merge HH | SSN # First I No Results Found | ame | Last Name DOB | |
| Energy Education View Kit Component New | | | Add New Mem | ıber |
| | | | Data Classifica | ition: 3 |
| | Oregon Housing a | nd Community Services © | | |

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 | Agency: OHCS User: TESTUSER Timeout: 17:20 |
|---|---|
| Energy Assistance | e Log Out Ureton |
| | Client Version Fiscal Version Anagement Reports Help |
| Client Search View | Client New |
| New Edit | Client Information (Fields marked with * are required.) |
| Residence | Title 📃 |
| View New | First Name KOR * Middle |
| Edit | DOB 09-21-1012 |
| Household View | Adult Id Verified? |
| Mail/Ph Update | Comments |
| Move Client to HH HH to Residence Merge HH | |
| Energy Education View Kit Component New | 2000 characters left (spaces count) |
| the component new | Phone |
| | Primary Phone 503-988-8888 503-555-1212 EXT WORK |
| | Mailing Address* |
| | No. Direction Street Name Type Direction Unit # |
| | CityST Zip Code+4County |
| | ENTERPRISE-97828 OR 97828-ENTERPRISE WALLOWA |
| | Client Characteristics Gender: MALE Ethnicity: REFUSED Education: POST SECONDARY, NO DEGREE Homebound: Transport: |
| | |
| | Race (Check all that apply)* |
| | Arrican American O Don't Know Don't Know Refused |
| | 🗆 Asian |
| | White |
| | |
| | Non-Cash Benefits (Check all that apply)* |
| | SNAP Oregon Health Plan MEDICARE O None |
| | □TANF Trans □Other TANF □Public Rental Assist |
| | |
| | |
| | Does this client have any income? NONE - ZERO INCOME STATEMENT * |
| | Required zero income comments should be entered here. |
| | * |
| | Save |
| 1 | |
| | 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 | : OHCS : KOR SON-OF-RYNA Program ▼ Fisc | R al ▼ Mana | gement 🔻 | User: TESTU Timeout: 19:39 Log Reports ▼ Help | Out Oregon Housing and Con | ununity Services | | | |
|------------------------------------|--|---|--------------------------|----------------------|--|-------------------------------|------------------|--|--|--|
| Client | Client View | | | | | | Version 3.0.4T | | | |
| /iew New Edit | Select Another Client in F | H KOR SON-OF-R | YNAR 🗾 Go | 0 | | | | | | |
| Residence | Client Information | | | | | | | | | |
| lew dit | DOB: 09- | R SON-OF-RYNAR -21-1912 | 55 | SN/SYS ID# Age: | SKOR092112 101 | | | | | |
| laucahold | SSN Verification: YE | 5 | Adult 1 | D Verified? | YES | | | | | |
| iew Iail/Ph Update CB Update | Comments: | | | | | <u>^</u> | | | | |
| ove | | | | | | | | | | |
| H to Residence | Dhaway 50 | 000 0000 Turne W | | | | v | | | | |
| erge HH nergy Education | Phone: 50. | * E | xt: | 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: UNKNOWN Race: REFUSED | | | | | | | | | |
| | Oregon Tribe: Edit Client View | Household | | | | | | | | |
| | | | | | | | | | | |
| | Non-Cash Benefits | | | | | | | | | |
| | N SNAP N VA Med Serv | N Oregon | Health Plan hild Care | N | MEDICARE TANF Trans | N WIC N Other TANF | | | | |
| | N Public Rental Assist | N Other H | lealth Ins | N | Other Source | N Temp Rental Assi | st | | | |
| | Payments - This Hou | isehold (Sorted by | Name then A | uth #, click | header to change | secondary sort) — | | | | |
| | Name Amou | int Chk No | Ch | k Date | Auth # | Type St | atus | | | |
| | | | | | , at a second se | 1,900 | | | | |
| | 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 | ne - Zero Ind | 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 | | | 1 | Data Cl | assification: 3 | | | |
| | | Oregon Housin | a and Commu | nity Convice | - A | | | | | |

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

| OPUS Energy Assistance | e | gency: Client: | OHCS KOR SON-OF | -RYNAR | | | User: Timeout: | TESTUSER 19:39 Log Out | Orecon | |
|--|---|---|--|--|---|---|--|------------------------------|---|---------------------|
| | Clie | nt 🔻 | Program 🔻 | Fiscal | ▼ Man | agement 🔻 | Reports 🔻 | Help 🔻 | Housing and Con | initianity 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 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 | Select Another Cl Select Another Cl Client Informa D SSN Verificati Commen Pho Pho Pho Pho Pho Pho Pho Pho Pho Pho | ne: 503 ne: 50 | IH KOR SON R SON-OF-RYN 21-1912 21-1912 3 3-988-8888 Ty County WAL s | I-OF-RYI IAR VPE: WO * Ext LOWA Y, NO Dregon H TANF Chil Dther Hea Chk No Sorted I | Adult RK Edit : : : : : : : : : : : : : : : : : : : | Disability: Veteran: Language: Race: | SKOR092112 101 YES L YES NO YES MAYAN GROUP REFUSED MEDICARE TANF Trans Other Source header to char Auth # click header t | Add | IC ther TANF emp Rental Assi Type S secondary sor | t) |
| | 「 Income/Empl Does this clier Zero | oyer (S nt have Incom | Setting to Noi any income [:] e Comments | NONE NONE Requi comme here. | - Zero Ir - ZERO IN red zero nts show | COME STAT | Know or Refu EMENT V ered | sed will de | elete all incom | e) |
| | 1947 characters | left (sp | aces count) | I | | | Seve | | | |
| | | | | | | | Jave | | | |
| | Туре | 1 | Source/E | mp | 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 | e | Agency Client Residence | : OHCS : WORF SON-(: ENTERPRISE | DF-MOGH , OR 97828 | | User: Timeout | TESTUSER 19:48 Log Out | Orecon Housing and Community Services |
|-----------------------------|---------------|-------------------------------|--|-----------------------|--------------------|------------------|------------------------------|--|
| | | Client 🔻 | Program 🔻 | Fiscal 🔻 | Management 🔻 | Reports • | Help 🔻 | Varian 2.0.4T |
| Client Search | Clien | t View | 7 | | | | | Version 5.0.41 |
| View New Edit | Select Anot | her Client in I | HH WORF SC | N-OF-MOGH | Go | | | |
| Residence | Client In | formation - | | | | | | |
| View | | Name: W | ORF SON-OF-MO | GH | SSN/SYS ID# | SWORF040365 | ; | |
| Edit | | DOB: 04 | -03-1965 | | Age: | 48 | | |
| Household | SSN Ver Co | ification: YE mments: | S | | Adult ID Verified? | YES | | |
| 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 Housing an 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 | 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) * P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e.g., P.O. BOX 1701 - ENTERPRISE OR, 97828 Physical location where they sleep under street name: e. |
| 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: * Ext: Type: CELL * Add Add HH Delete HH |
| | K'EHLYR WORF Phone: Type: HOME # Ext: Type: CELL # Add Add Add HH Delete Delete Hone: Type: HOME Edit Delete Hone: Type: HOME Edit Delete Phone: Type: HOME Edit Delete Phone: * Ext: Type: CELL 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*)

| 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 |
| Move Client to HH HH to Residence Merge HH | Select One V ORSelect One V ORSelect One V 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 Phone: 503-999-0000 * Ext: Type: CELL * Add Add HH |
| | ALEXANDER ROZHENKO Phone: 800-555-9422 Phone: 503-888-8888 Ext: Type: CELL Add Add HH Delete HH |
| | K'EHLYR WORF Edit Delete Phone: 800-555-9422 Type: CELL Add Add Add HHH Phone: 800-555-9422 Ext: Type: CELL * Add Add HHH |
| | KURN SON-OF-MOGH Phone: 503-000-9999 Type: HOME Edit Delete Phone: * Ext: Type: CELL * Add Add HH 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 | OHCS | _ | | User: TES | TUSER | | 405 OF |
|------------------------------|---|---------------------------|-------------------------|-------------------------|----------------------------|-----------------|-----------|----------------|
| Energy Assistance | e | KOR SON-OF-RYNA | ĸ | | Log | J Out Dr | egon | |
| | Client 🔻 | Program 🔻 Fisc | al 🔻 Mana | gement 🔻 | Reports 🔻 He | Ip 🔻 Housing | and Commu | inity Services |
| Client Search | Client View | , | | | | | Ve | ersion 3.0.4T |
| View New | Select Another Client in H | H KOR SON-OF-R | | D | | | | |
| Edit | Client Information | , | | | | | | |
| Residence View | Name: KC | R SON-OF-RYNAR | S | 5N/SYS ID# | SKOR092112 | | | |
| New Edit | DOB: 09 | -21-1912 | | Age: | 101 | | | |
| Household | Comments: | 5 | Adult | (D Verified? | YES | | | |
| Mail/Ph Update NCB Update | | | | | | | | |
| Move Client to HH | | | | | | | - | |
| HH to Residence Merge HH | Phone: 50 | 3-988-8888 Type: V | ORK Edit | Delete | | | | |
| Energy Education | Phone: | * [| xt: | Type: CELL | ▼* Add |] | | |
| Kit Component New | Mailing Address | | | | | | | |
| | 999 PAGH ST | County WALLOWA | | | | | | |
| | LINTERPRISE, OR 97820 | County WALLOWA | | | | | | |
| | Client Characteristic | 5 | | | | | | |
| | Gender: MA Ethnicity: RE | FUSED | | Disability: Veteran: | YES | | | |
| | Education: PO | ST SECONDARY, NO | | Language: | MAYAN GROUP | | | |
| | Homebound: UN | IKNOWN | | Race: | REFUSED | | | |
| | Oregon Tribe: | | | | | | | |
| | Edit Client | Housenoid | | | | | | |
| | Non-Cash Benefits | | | | | | | |
| | | N Oregon | Health Plan | N | MEDICARE | N WIC | | |
| | N VA Med Serv N Public Rental Assist | N TANE C N Other H | hild Care lealth Ins | N | TANF Trans Other Source | N Other TANF | al Assist | |
| | | | | | | | | I |
| | Payments - This Hou | isehold (Sorted by | Name then A | uth #, click | header to change | secondary so | rt) | |
| | Name Amou | int Chk No |) Ch | k Date | Auth # | Туре | State | JS |
| | Payments - Previou | s Household (Sorte | d by Name th | en Auth #, o | click header to cha | 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 | \$ | | Save | | | |
| | Туре | Source/Emp | Monthly | Annual | Verified Date | Last 30 D | ays | Exclude |
| | New Income | Total | \$0.00 | \$0.00 | | | | |
| | | l | | | | D | ata Clas | sification: 3 |
| | | Oregon Housin | g and Commu | unity 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 | e Agency: OHCS User: TESTUSER Client: KOR 5ON-OF-RYNAR Timeout: 19:33 Log Out Orecon | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|
| | Client Program Fiscal Hanagement 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 | | | | | | | | | |
| Edit | DOB 09-21-1912 (mm-dd-yyyy)* SSN/Sys# SKOR092112 * Create ID | | | | | | | | | |
| Household View Mail/Ph Update | Adult Id Verified? | | | | | | | | | |
| Move Client to HH HH to Residence Merge HH | | | | | | | | | | |
| Energy Education View | 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) | | | | | | | | | |
| | "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 ENTERPRISE-97828 | | | | | | | | | |
| | Client Characteristics | | | | | | | | | |
| | Gender: MALE | | | | | | | | | |
| | Ethnicity: REFUSED * Veteran: YES * Education: POST SECONDARY NO DEGREE Language: MAYAN GROUP | | | | | | | | | |
| | Homebound: Transport: NO | | | | | | | | | |
| | Race (Check all that apply)* | | | | | | | | | |
| | African American C Don't Know American Indian/Alaska Native Refused | | | | | | | | | |
| | Asian Native Hawaiian or Parific Islander Oregon Tribes | | | | | | | | | |
| | White | | | | | | | | | |
| | Non-Cash Banefitz (Chask all that angle) | | | | | | | | | |
| | NAP Oregon Health Plan Image: Discontinuation of the servent of the | | | | | | | | | |
| | Save Changes | | | | | | | | | |
| | Data Classification: 3 | | | | | | | | | |
| | Oregon Housing and Community Services © | | | | | | | | | |

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

| OPUS Energy Assistanc | Agency: Client: | : OHCS : KOR SON-OF-RYNA | ιR | | User: TEST Timeout: 19:5 Log | USER 1 Out Housing and Co | M Contraction of the services |
|---|-----------------------------|-----------------------------|-------------------------|-------------------------|------------------------------------|----------------------------------|-------------------------------|
| | Client 🔻 | Program 🔻 Fisc | cal 🔻 Mana | ngement 🔻 | 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 | | | | | | |
| New | Name: KO | R SON-OF-RYNAR | S | SN/SYS ID# | SKOR092112 | | |
| Edit | SSN Verification: YE | 5 | Adult | ID Verified | YES | | |
| View | Comments: | | | | | | - |
| Mail/Ph Update NCB Update Move | | | | | | 4 | |
| Client to HH HH to Residence | | | | | | - | |
| Merge HH | Phone: 50 | 3-988-8888 Type: V | VORK Edit | Delete | | | |
| Energy Education View Kit Component New | Phone: | * E | :xt: | Type: CEL | L* Add | | |
| | Mailing Address | | | | | | |
| | 999 PAGH ST | | | | | | |
| | ENTERPRISE, OR 97828 | County WALLOWA | | | | | |
| | Client Characteristic | s | | | | | |
| | Gender: MA Ethnicity: RE | LE FUSED | | Disability Veteran | : NO : YES | | |
| | Education: PO | ST SECONDARY, NO | | Language | MAYAN GROUP | | |
| | DEGREE Homebound: UN | KNOWN | | Pace | REFUSED | | |
| | Oregon Tribe: | | | hace | | | |
| | Edit Client View | Household | | | | | |
| | Non-Cash Benefits | | | | | | |
| | | N Oregon | Health Plan | $\overline{\mathbf{A}}$ | MEDICARE | N WIC | |
| | N Public Rental Assist | Y Other F | Hild Care Health Ins | N | Other Source | N Other TANF N Temp Rental As | ist |
| | | | | | | | |
| | Payments - This Hou | isehold (Sorted by | Name then A | uth #, click | header to change s | secondary sort) ⁻ | |
| | Name Amou | nt Chk No | CH | k Date | Auth # | Туре | Status |
| | Payments - Previous | s Household (Sorte | d by Name ti | nen Auth #, | click header to cha | nge secondary so | ort) |
| | ☐ Income/Employer (| Setting to None, No | ne - Zero In | come, Don't | Know or Refused w | ill delete all inco | ne) |
| | 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 (| lassification: 3 |
| | | Oregon Housin | g and Comm | 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 | Ag C | ency: OHCS lient: KOR SON-C | DF-RYNAR | | | User: TEST Timeout: 19:5 Log | | CON nd Comm | unity Services | |
|---|---|--------------------------------|---------------------------|--------------------------|---------------|------------------------------------|-------------------|----------------|----------------|--|
| | Client | Program V | Fiscal | Mana | gement 🔻 | Reports Hel | lp - | ~ | | |
| Client Search | Client Vi | ew | | | | | | V | ersion 3.0.4T | |
| View New Edit | Select Another Clie | nt in HH KOR SO | N-OF-RYN/ | AR 🔽 Go | 0 | | | | | |
| Residence View | Client Informat | ion e: KOR SON-OF-RY | 'NAR | 55 | 5N/SYS ID# | \$ SKOR092112 | | | | |
| New Edit | DO | B: 09-21-1912 | | | Age | : 101 | | | | |
| Household View | SSN Verificatio Comment | n: YES s: | | Adult 1 | D Verified? | ? YES | | | | |
| Mail/Ph Update NCB Update | | | | | | | | <u></u> | | |
| Move Client to HH HH to Residence | | | | | | | | - | | |
| Merge HH | Phon | e: 503-988-8888 1 | Type: WORI | Edit | Delete | | 1 | | | |
| Energy Education View | | c. | LXI. | | Type. [CEL | | 1 | | | |
| KIE Component New | Mailing Address | 5 | | | | | | | | |
| | 999 PAGH ST | | | | | | | | | |
| | ENTERPRISE, OR 97828 County WALLOWA | | | | | | | | | |
| | Client Characte | ristics | | | | | | | | |
| | Gende | r: MALE | | | Disability | NO VES | | | | |
| | Educatio | n: POST SECONDA | RY, NO | | Language | MAYAN GROUP | | | | |
| | DEGREE | | | | Daga | DEFLICED | | | | |
| | Oregon Trib | e: | | | касе | : REFUSED | | | | |
| | Edit Client | /iew Household | | | | | | | | |
| | Non-Cash Bene | fits | | | | | | | | |
| | N SNAP | N | Oregon Hea | alth Plan | Y | MEDICARE | N WIC | | | |
| | Y VA Med Serv N Public Rental A | ssist Y | TANF Child Other Healt | Care h Ins | N N | TANF Trans Other Source | N Other TANF | l Assist | | |
| | | | | | | | | | | |
| | Payments - Thi | s Household (Sor | ted by Nar | ne then A | uth #, click | header to change | secondary so | -t) | | |
| | Name | Amount | Chk No | Ch | k Date | Auth # | Туре | Sta | tus | |
| | Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort) | | | | | | | | | |
| | [Income/Emplo | yer (Setting to No | one, None | Zero Inc | ome, Don't | Know or Refused v | vill delete all i | ncome |) | |
| | Does this client | have any income | e? YES | | | ▼ Save | | | | |
| | Туре | Source/I | Emp M | Ionthly | Annual | Verified Date | Last 30 Da | ys | Exclude | |
| | New Income |) | Total | \$0.00 | \$0.00 | | | | | |
| | \sim | | | | | | Da | ta Cla | ssification: 3 | |
| | | Oregon | Housing ar | nd Commu | inity Service | es © | | | | |

Figure 2-10: Client View – New Income Button

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

| Sc | ource (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 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 r Comm | Fields mar (Fields mar urce: STAT ype: UNEI Dunt: 250.00 How: Chec eceived in eents | Employe ked with * are E OF OREGON MPLOYMENT) * Fre k Pay Stub past 30 days? Paces count) | r New e required.) quency Mo • Verifie Don't us | nthly • • ad By: TNU * Ve se this record when | rified Date: [] n creating Pay | 9-28-2012 ∕ments? □ | Version 3.0.4T |
| Merge HH Energy Education View Kit Component New | Employe Ph Addre: Addre: City, S | r Informati one: | on 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-RYNAR Client V Program V Fisca | | | | User: TESTU: Timeout: 19:39 Log O | Housing and Com | munity Services | | | | |
|---|--|-------------------------------|----------------------|-----------------------------|---|-------------------|-----------------|--|--|--|--|
| Client | Client Min | | Hanay | | eports itelp | | Version 3.0.4T | | | | |
| Search View | Chent view | N | | | | | | | | | |
| New Edit | Select Another Client i | HH KOR SON-OF-RYN | NAR 🗾 Go | | | | | | | | |
| Residence | Client Information | I | | | | | | | | | |
| New Edit | Name: DOB: | COR SON-OF-RYNAR | SSN | /SYS ID# SK Age: 101 | OR092112 L | | | | | | |
| Household | SSN Verification: | YES | Adult ID | Verified? YES | S | | | | | | |
| View Mail/Ph Update NCB Update | Comments: | | | | | <u>.</u> | | | | | |
| Move Client to HH HH to Residence | | | | | | v | | | | | |
| Merge HH | Phone: | 503-988-8888 Type: WO | RK Edit | Delete | | | | | | | |
| Energy Education View Kit Component New | Phone: | * Ext | ידו | /pe: CELL | ▼* Add | | | | | | |
| Kit Component New | Mailing Address | | | | | | | | | | |
| | 999 PAGH ST ENTERPRISE, OR 97828 County WALLOWA | | | | | | | | | | |
| | Client Characteristics | | | | | | | | | | |
| | Gender: | MALE | I | Disability: NO | | | | | | | |
| | Ethnicity: Education: | REFUSED POST SECONDARY, NO | L | Veteran: YES anguage: MA | S YAN GROUP | | | | | | |
| | DEGREE | | | | | | | | | | |
| | Homebound: Oregon Tribe: | JNKNOWN | | Race: RE | FUSED | | | | | | |
| | Edit Client Vie | w Household | | | | | | | | | |
| | | | | | | | | | | | |
| | Non-Cash Benefits | ; | | | | | | | | | |
| | N SNAP Y VA Med Serv | N Oregon H N TANF Chil | ealth Plan d Care | Y MED N TAN | F Trans N | WIC Other TANF | | | | | |
| | N Public Rental Assis | t Y Other Hea | ilth Ins | N Othe | er Source 🛛 🕅 | Temp Rental Assis | t | | | | |
| | Payments - This H | ousehold (Sorted by Na | ime then Aut | h #, click hea | ader to change se | condary sort) — | | | | | |
| | Name Am | ount Chk No | Chk | Date | Auth # | Type St | atus | | | | |
| | Payments - Previo | us Household (Sorted I | by Name the | n Auth #, clic | k header to chan <u>c</u> | ge secondary sor | :) | | | | |
| | ☐ Income/Employer | (Setting to None, None | - Zero Inco | me, Don't Kno | ow or Refused will | delete all incom | e) | | | | |
| | Does this client ha | 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 | Total | \$250.00 | \$3,000.00 | | | | | | | |
| | | | | | | Data Cla | assification: 3 | | | | |
| | | Oregon Housing a | and Commun | ty 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*).

| Agency: OHCS | | | | | User: Timeout: | TESTUSER 19:58 Log Out | Oregon | |
|---------------------------------|------------------|---------------------------|---------------|-------------------|-------------------|------------------------------|-----------------|------------------|
| | Clie | ent 🔻 Program 🔻 | Fiscal 🔻 | Management 🔻 | Reports 🔻 | Help 🔻 | nousing and com | and any services |
| Client Search View New | Client S | earch | | | | | | Version 3.0.4T |
| Edit | Search Paran | neters (at least one f | field require | ed) | | _ | | _ |
| Residence | SSN/SYSID: | | - Ad | Idress: %VORCHA | λ | Ur | nit: | (ie Apt B) |
| View | First Name: | | _ | City: ENTERPR | ISE | | | |
| Edit | Last Name: | | | Zip: | Show Resi | dence Info. | only | |
| Usurschold | When you Clic | k in Search Results: | See | rch | | | | |
| View | Client's SSN = H | Household Screen | Sea | | | | | |
| Mail/Ph Update | Client's Name = | Client Screen | Advan | ced Search | | | | |
| NCB Update | Residence Addr | ess = Residence Screer | | | | | | |
| Move Client to HH | A maximum of : | 100 results will be retur | ned. | | | | | |
| 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 | issification: 3 |
| | | Oregon H | ousing and | Community Service | es © | | | |

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

| OPUS Energy Assistance | e | Agency | 1: OHCS | | | User Timeout | : TESTUSER : 18:29 Log Out | Orecon () |
|---|---|---|--|--|--|---|--|--|
| | | 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 City ENTERF | not a valid ra S" is not a v ridge at 3rd S Direc PRISE-97828 | asidence address alid address: If i St; Super Center tion Street Na VORCHA | s. Parking Lot me St. Zip * OR 978 | t address, enter ph on Main; ¾ miles p <u>Code</u> i28-ENTERPRISE | ysical location w ast mile post ma Type AVE | here they sle rker 35 on F Direction +4 | eep under street name: e.g., wy 166. Unit # County WALLOWA |
| Move Client to HH HH to Residence Merge HH | Residence | Type MFD | /Mobile 💌 | * Residen | ce Status Rent (| Heat not) | | * |
| Energy Education | Energy So | ources (*) | At least one sou - | rce of energy | must be selected. | | _ | |
| View ^{~~} Kit Component New | Electr | ic [al Gas [Gas [| Wood Pellet Solar Other | | Primary Source [| ELECTRIC | _ * | Save Data Classification: 2 |
| | | | Oregon H | ousing and | Community Servi | ces © | | |

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 | Agency: 0 | DHCS Program V Fiscal V | Management | User: TES Timeout: 19: L | elp | munity Services |
|--|---|--|------------------------------|--------------------------------|---------------|-----------------|
| Client Search View New Edit | Client Search | New | are required, | wildcards will be re | emoved) | Version 3.0.3P |
| Residence View New Edit Household View Mail/Ph Update NCB Update | First Name WO Last Name SO SSN/Sys# SW OPUS will search the data | NF N-OF-MOGH ORF040365 * base to find this client befor | * * pre 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 | 9 | Last Na | Add Ne | DOB w Member |
| | | Oregon Housing and | Community Serv | ices © | | |

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 Client | : OHCS : KOR | 5 SON-OF | RYNAR | | | | Tim | User: T eout: 1 L | ESTUSE 9:36 . og Out | 01 | egon | |
|---|------------|--|---------------------|-----------------|-------------|-------------|---------|---------|------------|----------|-------------------------|-----------------------------------|-----------|---------|-----------------|
| | | Cli | ent 🔻 | Prog | ram 🔻 | Fiscal 🔻 | Man | ageme | ent 🔻 | Report | s 🔻 I | Help 🔻 | Housing | and Com | munity Services |
| Client Search View | Ho | useh | old | Viev | N | | | | | | | | | | Version 3.0.4T |
| Edit | Hous | ehold - | Click S | SN/SYS | 5ID will | open the C | lient V | iew Sc | reen. Ho | ver ov | er code | e for full | l versior | n. — | |
| Residence | HH N | lembers | ; | | | | | - | Bold Re | d elem | ents indi | cate poo | r data qu | ality | - |
| View New | R | SSN/S | YSID | | Nam | e | Age | Gen | Educ | Vet | Disb | Ethn | Race | NCB | Income |
| Edit | | SKORO | 92112 | KOR 5 | ON-OF-F | RYNAR | 101 | м | PS | Y | N | RF | RF | Y | Y |
| Household View Mail/Ph Update NCB Update | Ne To F | New Client To Remove Household: Click this button | | | | | | | Move | Entire | House | hold to | Unknow | vn | |
| Move Client to HH | Payr | nents - 1 | This Ho | usehol | d (Sorte | ed by Name | e then | Auth # | , click he | eader (| to chan | ge seco | ndary so | ort) — | |
| HH to Residence Merge HH | Nam | e | Amo | unt | c | Chk No | C | hk Date | | Au | ıth # | | Туре | St | atus |
| Energy Education View Kit Component New | Payr | nents - I | Previou | s Hous | ehold (| Sorted by I | Name t | hen Au | ıth #, cli | ck hea | der to d | change : | seconda | ry sort | :) |
| | Clier | t Vendo | r (Vend | ors in | red are | expired) | | r | Income | Summ | ary — | | | | |
| | Vend | lor | Туре | Pri | Acct# | Name | /Acct | | KOR SO | N-OF-R | YNAR | | | | \$3,000.00 |
| | Nev | v Vendo | or | · | | | | | Househ | old Su | mmary | | | | |
| | Addr | ess | | | | | | | Total Inc | ome | | | | | \$3,000.00 |
| | т | Addre | 255 | | | | | | % of Po | verty | | | | | 26% |
| | м | 999 P/ ENTER | AGH ST (PRISE, (| OR 978: | 28 | | | | % of OM | I | | | | | 8% |
| | Phor | | | | | | | | HH Type | of Perso | ons | | | | * |
| | Т | Numbe | r | | Client | Name | | | Househo | ld Subs | idized | , | | | |
| | W | (503) 98 | 8-8888 | | KOR S | ON-OF-RYNA | R | | | | Mak | ke any ch | nanges? | Save | Changes |
| | | | | | | | | | HH Con | ments | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | 2000 ch | aracters | s left (sp | aces cou | int) | | |
| | | | | | | | | | | | | | D | ata Cla | ssification: 3 |
| | | | | 0 | regon H | ousing and | l Comm | unity S | ervices | Ô | | | | | |

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 | Agency Clien | 7: OHCS t: KOR SON-OF | -RYNAR | | User: TESTUSER Timeout: 19:54 Log Out | | | | |
|--|------------|-----------------|--------------------------|-----------------|----------------------|---|--------------|------------------------|--|--|
| | | Client 🔻 | Program 🔻 | Fiscal 🔻 | Management 🔻 | Reports 🔻 | Help 🔻 | | | |
| Client Search View New | Clien | t Sear | ch New | | | | | Version 3.0.4T | | |
| Edit | current | nousenoid | rempers | | | | | | | |
| Residence | 1 | | Na | ame | | | Gender | Age | | |
| View | ٤ | | КС | DR SON-OF-R | YNAR | | м | 101 | | |
| Edit | | | | | | | | | | |
| Household | New Clie | ent Informa | tion (Fields ma | arked with * | are required, wi | ildcards will b | e removed) — | | | |
| View Mail/Db Undate | | ſ | | | | | | | | |
| NCB Update | First Name | • | ANG | | | DOB 12-12-18 | 13 (mm- | dd-yyyy)* | | |
| Move | Last Name | • | SON-OF-AROK | | * | Create | e ID | | | |
| Client to HH | SSN/Sys# | . | SKANG121213 | * | | | | Search | | |
| HH to Residence | | , | | | | | | | | |
| | OPUS will | search the d | atabase to find t | his client befo | re creating a new re | ecord. | | | | |
| Energy Education | | | | | | | | | | |
| Kit Component New | Possible | Pre-Existi | ng Client Match | ies | | | | | | |
| | | SSN # | | First Name | • | Las | t Name | DOB | | |
| | No Result | s Found | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | Add New Member | | |
| | | | | | | | | Data Classification: 3 | | |
| | | | Oregon H | ousing and | Community Service | es © | | | | |

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 | Client New Version 3.0.4T |
| New Edit | Client Information (Fields marked with * are required.) |
| Residence | Title 🔽 |
| View New | First Name KANG * Middle |
| 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 | × v |
| Energy Education | 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 ilocation 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 VINIT 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 Don't Know American Indian/Alaska Native Refused |
| | 🗆 Asian |
| | White Oregon Thes |
| | |
| | Non-Cash Benefits (Check all that apply)* |
| | LISINAP LIOregon Health Plan LIMEDICARE ® None WIC VA Med Serv TANF Child Care O Don't Know TANF Trans. Other TANE |
| | 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 | e | Agency: Client: | : OHCS : KANG SON-O | F-AROK | | | User: Timeout: | TESTUSER 19:36 Log Out | Oreco | m |
|---|--------------------|-----------------------|------------------------------|------------|-------------|---------------------|--------------------|------------------------------|----------------|-------------------|
| | Cli | ent 🔻 | Program 🔻 | Fiscal | ▼ Man | agement 🔻 | Reports 🔻 | Help 🔻 | Housing and Co | ommunity Services |
| Client Search | Client V | /iew | , | | | | | | | Version 3.0.4T |
| View New | Select Another (| Client in H | | -OF-RYI | NAR - C | io | | | | |
| Edit | n Clinet Inform | | 1 | | | | | | | |
| Residence View | Client Inform | nation ame: KA | NG SON-OF-AR | ок | , | SN/SYS ID# | # SKANG121213 | | | |
| New Edit | | DOB: 12 | -12-1913 | | - | Age | : 99 | | | |
| Household | SSN Verifica | tion: NO | | | Adult | ID Verified | ? YES | | | |
| View Mail/Ph Update NCB Update | | ents. | | | | | | | 2 | |
| Move Client to HH HH to Residence | | | | | | T | | | 7 | • |
| Merge HH | Ph | one: | | * Ext | | Type: CEL | -L <u>*</u> * | Add | | |
| View | Mailing Addr | ess — | | | | | | | | |
| Kit Component New | 999 PAGH ST | | | | | | | | | |
| | ENTERPRISE, C | OR 97828 | County WAL | LOWA | | | | | | |
| | Client Chara | cteristic | s | | | | | | | |
| | Ger | nder: MA | LE | | | Disability | : NO | | | |
| | Ethni Educa | city: HIS tion: PO | SPANIC/LATING ST SECONDAR |) Y, NO | | Veteran Language | : YES : SPANISH | | | |
| | DEGREE | | | | | | | | | |
| | Homebo Oregon T | und: UN ribe: | IKNOWN | | | Race | : SINGLE | | | |
| | Edit Client | View | Household | | | | | | | |
| | | | | | | | | | | |
| | Non-Cash Be | nefits - | | | | | | | | |
| | N SNAP | | N C | Dregon H | ealth Plan | N | MEDICARE | N W | IC | |
| | N Public Renta | v al Assist | N C | Other Hea | alth Ins | N | Other Source | | emp Rental As | sist |
| | | | | | | | | | | |
| | Payments - | This Hou | isehold (Sorte | ed by Na | ame then | Auth #, click | c header to cha | inge seco | ndary sort) - | |
| | Name | Amou | int C | Chk No | c | hk Date | Auth # | | Туре | Status |
| | Payments - | Previous | s Household (| Sorted I | by Name t | hen Auth #, | click header to | o change s | secondary so | ort) |
| | [Income/Em | oloyer (: | Setting to Nor | ne, None | e - Zero Ir | icome, Don'i | t Know or Refu | sed will de | elete all inco | me) |
| | Does this clie | ent have | e any income? | YES | | - | | | | |
| | | | | | | | Save | | | |
| | Туре | | Source/E | mp | Monthly | Annual | Verified Da | ite L | ast 30 Days | Exclude |
| | New Income | e | - | Total | \$0.00 | \$0.00 | | | | |
| | | | | | | | | | Data C | lassification: 3 |
| | | | Oregon H | ousing a | and Comm | unity Service | es © | | | |

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: Client: Residence: Client ▼ | OHCS KOR SON-OF-RYNA ENTERPRISE, OR 9 Program ▼ Fise | AR 97828 cal ▼ |) Mana | gemer | nt▼ R | L Time eports | lser: TE cout: 19 L | STUSER 9:53 og Out Ielp ▼ | Or Housing | CON and Comm | munity Services |
|---|--------------|---|---|----------------------|-----------|--------|----------|---------------------|---------------------------|------------------------------------|---------------|-----------------|-----------------|
| Client Search View New Edit | Ho | usehold V sehold - Click SSI | iew N/SYSID will open | the Clie | 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 | or 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 | | SKANG121213 | KANG SON-OF-ARC | ж | 99 | М | PS | Y | N | н | s | N | Y |
| Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH | To I Sele | 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 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 | Agency: OHCS Client: KOR SON-OF-RYNAR Residence: ENTERPRISE, OR 97828 Client V Program Fiscal V | | | | | | User: TESTUSER Timeout: 19:52 Log Out Management ▼ Reports ▼ Help ▼ | | | | | | | | nunity Services |
|--|--|----------------------|----------------------|--------|------------------------|-------------------------------|--|--------|------------|---------|-----------------|-----------|------------|---------|-----------------|
| Client Search View New | Ho | useho | old V | /iev | N | | | | | | | | | , | 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 | нн | 1embers | | - | | | | | Bold Re | d elem | ents ind | icate poo | or data qu | uality | |
| New Edit | R | SSN/S | SYSID | | Nan | ne | Age | Gen | Educ | Vet | Disb | Ethn | Race | NCB | Income |
| Household | | SKORO | 92112 | KOR | SON-OF | RYNAR | 101 | M | PS | Y | N | RF | RF | Y | Y |
| View Mail/Ph Undate | SKANG121213 KANG SON-OF-AROK 99 | | | | | | | м | PS | Ŷ | N | н | s | N | Ŷ |
| NCB Update | | ew Clien | | | | | | ſ | Deerer | - 05- | | | | 1 | |
| Move Client to HH HH to Residence | Sele | Remove I Remove I | under the Househo | R colu | imn abov ick this b | : ve, then Click outton | this bu | tton l | Move E | Entire | House | hold to | Unknow | un l | |
| Merge HH | | | | | | | | | | | | | | | |
| Energy Education | Pay | nents - 1 | This Hou | sehol | d (Sorte | d by Name | then A | uth #, | click he | ader t | o chan <u>c</u> | je seco | ndary so | ort) — | |
| Kit Component New | Nan | ie | Amou | nt | C | hk No | Ch | k Date | | Au | th # | | Туре | Sta | atus |
| | Payr | ments - F | Previous r (Vendo | Hous | ehold (S | Sorted by N | ame th | ien Au | th #, clic | k hea | der to c | hange : | seconda | ry sort |) |
| | Ven | 40m | Type | Pri | Acct# | Name/ | Acct | | | -OF-RY | NAR | | | | \$3,000,00 |
| 6 | Nev | v Vendo | r D | | 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 | R 9782 | 8 | | | | % of OMI | | | | | | 6% |
| | | 1701 V | ORCHA A | AVE SP | СЗ | | | | 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 | 8-8888 | | KOR SC | N-OF-RYNAF | | | HH Com | nents | | | | | |
| | | | | | | | | | 2000 cha | racters | left (spa | aces cou | nt) | | ~ |
| | | | | | | | | | | | | | | ata Cla | ssification |
| | Data Classification: 3 | | | | | | | | | | | | D | | |

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

| OPUS Energy Assistanc | e | Agency Client Residence | : OHCS : KOR SON-OF : ENTERPRISE, | -RYNAR , OR 97828 | | 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 | Clien Vendor J Nar Vendor/ Verificat Intake- Comment | Client t Venc information Client: ne on Acct: Account # Heat Type: ion Worker: TN s for venc acters left (sp | Program ▼ IOT New (Fields marked KOR SON-OF- 999-KOR-97821 PORTLAND G IU iors if need baces count) | Fiscal Fiscal | Management ▼ re required.) * (may/may not be ECTRIC / Electric 8-2012 (mm-dd | e same as Clier ▼ * | Help | 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 | e | Age Cl Reside | HCS ANG S NTERF | ON-OF- PRISE, C | -AROK DR 97828 | | | User: TESTUSEF Timeout: 19:46 Log Out | | | | R Drecon | | | |
|------------------------------|--------|--|-----------------------|--------------------|-------------------|--------------|----------------------------------|---|-----------|-----------|------------|-------------|------------|---------|-----------------|
| | | 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 | |
| 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 | N | To Remove a Client (one at a time): | | | | | Permove Client(a) from Household | | | | | | | | |
| Move Client to HH | Sele | ect client unde | r the R | colum | n above | , then Click | this bu | tton | rtemot | ie one | 11(3) 11 | omnot | Joenord | | |
| 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 th | | | | | | uth #, | click he | ader t | o chang | je secoi | ndary so | ort) — | |
| Kit Component New | Nan | ne A | k No | Ch | k Date | | Au | th # | | Туре | Sta | atus | | | |
| | Pay | ments - Prev | orted by N | ame th | 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 |
| | POR | TLAND ERAL | E | Y | 999-К0 97828 | OR- KOR S | SON-OF | | KANG SC | IN OF-A | ROK | | | | \$1,200.00 |
| | Ne | 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 | ST SE, OR S | 97828 | | | | | Total # o | f Perso | ns | | | | 2 |
| | Р | 1701 VORO ENTERPRIS | CHA AVE | E SPC 97828 | 3 | | | | нн Туре | J. C. Lat | | Co-F | labitants | | |
| | C. Dhe | | | | | | | | louserio | u Subsi | Mak | e anv 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 | nu) | ata Cl- | crification: 2 |
| | | Oregon Housing and Com | | | | | | | ervices / | 5 | | | U | ata Clà | ssincation: 3 |
| Figure 2-20 | New | Oregon Housing and Comm Jew Vendor section on the Household Vie | | | | | | | een | - | | | | | |

ENERGY ASSISTANCE OPUS User Manual, Section 2 – Client Intake-New Data Classification: 2 **'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 | е | Agency Client Residence Client 🔻 | : OHCS : KANG SON-OF-AF : ENTERPRISE, OR Program ▼ Fig | ROK .97828 scal ▼ | Management | User: Timeout: t▼ Reports ▼ | TESTUSER 18:19 Log Out Help T | Housing and Community Services |
|---|--------|---|---|-------------------------|----------------|-----------------------------------|--|--------------------------------|
| Client Search View New Edit | H I | Iousehold - Click SS | Payment New Search Payment SN/SYSID will ope | n the Cli | ient View Scre | en. Hover over co | de for full | Version 3.0.4T |
| Residence | Н | IH Members | | | | Bold Red elements | indicate poo | or data quality |

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

| OPUS Energy Assistance | ce | Agency Client Residence | I: OHCS t: KANG SON-O 2: ENTERPRISE, | F-AROK , OR 97828 | User: TESTUSER Timeout: 17:55 Log Out | | | | | | |
|--|---|--|---|--------------------------|--|--|-------------------------|----------------------|-----------|------------------|-------------|
| | | Client 🔻 | Program 🔻 | Fiscal 🔻 | Manageme | ent 🔻 🛛 Re | eports 🔻 | Help 🔻 | Tiousing | Commun | ty services |
| Payment Search View New Edit | Paym Fields mark Client Nam KOR SON-C KANG SON- APC CCN Applicant Select Appli HH Income Eligible in H Energy Typ | ent Ne ed * are req PF-RYNAR OF-AROK I-LP14-WAL- Information icant KOR \$4,20 H 2 e | Age Inco 101 \$3,00 99 \$1,20 LIHEAP 2014 SON-OF-RYNA 0.00 | me SSN 10.00 10.00 | Verified Y N Intake Date Intake Worker Subsidized | Adult ID Y Y (10-29-20 TNU N N tefer for We | Paymen | t Other HF N N | ۲ (۲)* | Vers | ion 3.0.4T |
| | Overide Ch | ildren Blockir | |] | | Ion Energy : inergy Relat | Services ted Advocad | | Load |) hta Classil | fication: 3 |

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 Assistant | ce | Agency: OHCS Client: KANG SON-OF-AROK Residence: ENTERPRISE, OR 97828 | | | | | Oregon () | | |
|--|---|---|--|--------------------------|---|--|-----------|--|--------------------------------|
| | | Client 🔻 | Program 🔻 | Fiscal 🔻 | Managem | ent 🔻 | Reports 🔻 | Help 🔻 | Housing and Community Services |
| Payment Search View New Edit | Payme Fields marked Client Name KOR SON-OF- KANG SON-OF APC CCN-I Select Applica HH Income Eligible in HH Energy Type Overide Child | ent Ne "RYNAR F-AROK P14-WAL-L formation ant KOR \$4,200 1 Iren Blockin | Age Inco 101 \$3,00 99 \$1,20 IHEAP 2014 SON-OF-RYNA .00 g | me SSN 0.00 NR 💌 * | Verified Y N Intake Date Intake Worke Subsidized | Adult I Y Y 10-25 or TNU N Refer for Non Ener Energy R | D Payme | nt Other HH N N (mm-dd-yyyy) on acy | Version 3.0.4T |
| | Payment Eligi | bility Statu | ACCEPTED | | | | | (L | oad |
| | Payment In | formation | \sim | | | | | | |
| | Type Selec | t Payment | Туре | * | | | Manu | al Auth# | |
| | Vendor | | Amount | Account St | atus | | Primary | Name on A Acct # | cct |
| | PORTLAND G ELECTRIC | ENERAL | 0.00 \$ | CURREN [®] | Γ | T | YES | OR SON-OF-R | YNAR . |
| | Direct Pay | | 0.00 \$ | CURREN | Г | - | * | | |
| | Agency | | 0.00 \$ | CURREN | Γ | - | * | | |
| | Comments | Tota | \$ 0.00 | | | Balanc | e \$ 0.00 | | |
| | 2000 characte | ers left (spa | ices count) | | | | Deny | / Hold S | Save |
| | - MICTO | | Oregon H | ousing and | Community | Services | © | | |

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

| OPUS Energy Assistance | Agency: OHCS Client: KANG SON-OF-AROK Residence: ENTERPRISE, OR 97828 Client V Program V Fiscal V Management V Reports V Help V |
|--|---|
| 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 99 \$1,200.00 Y N Age Income KOR SON-OF-AROK SSN Verified 99 \$1,200.00 Adult ID Y Payment Other HH Y N Applicant Information Select Applicant KOR SON-OF-RYNAR * Intake Date 10-29-2013 (mm-dd-yyyy)* HI Income \$4,200.00 Intake Worker TNU * Eligible in HH Subsidized N ELECTRIC * * Refer for Weatherization Non Energy Services In this example; the 'Eligible in HH' number was changed to '2'. By making this change, the 'Payment |
| < | Payment Eligibility Status: ACCEPTED Information became inactive. Payment Information The drop-down arrows, comments section and the 'Deny' 'Save' buttons are deactivated. Vendor Amount Account Status Primary Name on Acct # |
| | PORTLAND GENERAL 0.00 CURRENT VES CURRENT VES CORSON-OF-RYNAR 9999-KOR-97828 CURRENT VES |
| | 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 | e Re | Agency: Client: esidence: ient ▼ | OHCS KOR SON-C ENTERPRIS Program | DF-RYNAF E, OR 97 | ≀ 828 N I ▼ M a | anagement v | U Time Reports | Jser: TESTUSER cout: 11:00 Log Out | Dre Housing at | 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 Report Intake Disclaimer Notice of Action No Income Payment Receipt Intake Disclaimer Notice of Action No Income Intake Note: Click on the blue diamond to view the report definitions. Version 3.0.4T Intake Intake | | | | | | | | | | | | |
| | Client Name KOR SON-OF-R KANG SON-OF- | YNAR AROK | Age 11 | e Incon 01 \$3,00 9 \$1,20 | ne 0.00 0.00 | SSN Verified Y Y | Ad | lult ID Pay Y Y | yment Oth | ner HH N N | | | |
| | Applicant Info Name HH Income Eligible in HH Energy Type Non Energy Ser Payment Info Payment Type Insert Date | rvices rmation Standar 10-29-2 /endor | KOR SO \$4,200.1 2 ELECTR N :d 2013 | N-OF-RYN DO IC Amount | Primary | Intake Date Intake Worke Weatherizatio Override Chil Energy Relate Auth # Insert E | er on Referral dren Block ed Advocac By By | Y Si ing Payments :y C16112659 TNU US Name (| ubsidized | 10-29-2013 TNU N N Acct # | | | |
| C | PORTLAND GEN Comments on Payment Deta PORTLAND GEN Agency Paid | Payment | Total | \$480.00 \$480.00 | Y | CURRENT Ba Ba | etched | ing COR SON-O | F-RYNAR Check# Check | 999-KOR-97828 | | | |
| | | | Oreaon | Housina | and Com | munity Service | s © | | Da | ta 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**."

| Payment | s - This Hous | ehold (Sorte | d by Name then A | uth #, click header | to change second | lary sort) | | | | | |
|---|---|--------------|------------------|---------------------|-------------------|-------------|--|--|--|--|--|
| Name | Amount | Chk No | Chk Date | Auth # | Туре | 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 | C25303061 Special | | | | | | |
| Payment | Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort) | | | | | | | | | | |
| Name | Amount | Chk No | Chk Date | Auth # | Туре | Status | | | | | |
| OEAP12 P | G \$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.

| OPUS Energy Assistanc | e | Agency Client Residence | : OHCS : KANG SON-O : ENTERPRISE | F-AROK OR 97828 | Managaman | | Use Timeou | r: TESTUSER t: 19:41 Log Out | Ore | Community Services | | | | |
|---------------------------|--------------------------------------|-------------------------------|--|--------------------------|--------------------|-------------------|---------------|------------------------------------|----------|-----------------------|--|--|--|--|
| | | Client • | Program • | FISCAL * | Managemer | n • | Reports • | нер • | | | | | | |
| Payment Search View | Paym | ent Ne | W | | | | | | | Version 3.0.4T | | | | |
| New | Fields marked * are required. | | | | | | | | | | | | | |
| Edit | Client Nam KOR SON-O KANG SON- | ne DF-RYNAR OF-AROK | Age Inco 101 \$3,00 99 \$1,20 | me SSN 10.00 10.00 | 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 | | | | | |
| | Overide Chi | ildren Blockir | ig E | 1 | | n Ener | v Services | | | | | | | |
| | | | - | | En | erav Re | alated Advor | acv | | | | | | |
| | | | | | | iorgy in | | | | | | | | |
| | | | | | | | | | Load | | | | | |
| | Payment Eli | gibility Statu | S: ACCEPTED | | | | | | | | | | | |
| | Payment I | nformation | - | | | | | | | | | | | |
| | Type Sele | ect Payment | Гуре | * | | | Man | ual Auth# | | | | | | |
| | Vendor | | Amount | Account St | tatus | | Primary | Name on | Acct | | | | | |
| | 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 | • | * | | | | | | | |
| | | | | | Г | • | * | | | | | | | |
| | Agency | | 0.00 \$ | CONTREIN | • | _ | ,, | | | | | | | |
| | Community | Tota | \$ 0.00 | _ | | Balance | e \$ 0.00 | | | | | | | |
| C (| Client | , did not re | turn signed | applicat | ion | | | | A | | | | | |
| | Cilenc c | | curn signed | appiicat | 1011. | | | | | | | | | |
| | 2000 observe | store left (see | 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 Assistance | e Res | Agency: OHCS Client: KOR SON- idence: ENTERPRI | OF-RYNAR SE, OR 97 | 828 | | Т | Use Timeou | r: TESTUSER t: 16:28 Log Out | Ore | Community Services | | | | |
|---------------------------|---|--|-------------------------|--------------|-------------------------------------|---------|---------------|------------------------------------|------------|----------------------|--|--|--|--|
| Payment Search | Payment | nt • Program | ▼ Fisca | I ▼ Ma | nagement 🔻 | Rep | orts 🔻 | Help ▼ | | Version 3.0.4T | | | | |
| View | I dymen | | | | | | | | | | | | | |
| Edit | APC: CCN-L | P14-WAL-LIHEAP | 2014 | | | | | | + | Edit Payment | | | | |
| | PAYMENT REPORT | | | | | | | | | | | | | |
| | 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 | A | je Incor | ne | SSN Verified A | | | Adult ID Payment Other HH | | | | | | |
| | KOR SON-OF-RYN KANG SON-OF-AF | NAR ROK | 101 \$3,00 99 \$1,20 | D.00 D.00 | Y Y | | | Y Y | | N N | | | | |
| | Applicant Infor | mation | | | | | | | | | | | | |
| | Name | KOR S | ON-OF-RYN | AR | Intake Date | | | | 10-29-2013 | | | | | |
| | HH Income | \$4,200 | .00 | | Intake Worker | | | | | TNU | | | | |
| | Eligible in HH | 2 | Weatheri | | | on Refe | rral Y | sidized | N | | | | | |
| | Energy Type | ELECT | RIC | | Override Children Blocking Payments | | | | | N | | | | |
| | Non Energy Servi | ices N | Energy R | | | ted Adv | ocacy | | N | | | | | |
| | Payment Information | | | | | | | | | | | | | |
| | Payment Type | Standard | | Auth # | : | C16 | | | | | | | | |
| | Insert Date | 10-29-2013 | | | Insert By | | | 1 | | | | | | |
| | Insert Date | | | | | - V | | , | | | | | | |
| | Ve | endor | Amount | Primary | Account St | atus | Status | Name on | Acct | Acct # | | | | |
| | PORTLAND GENE | RAL ELECTRIC | \$.00 | Y | CURREN | | Deny | KOR SON-OF- | RYNAR | 999-KOR-97828 | | | | |
| | Total \$0.00 | | | | | | | | | | | | | |
| | Comments on P | ayment | | | | | | | | | | | | |
| | Client did not ret | urn signed applicatio | on. | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | Payment Detail | Is (by Vendor) | ending | | | | | | | | | | | |
| | FORTLAND GENE | RAL ELECTRIC F | 1-06-2013 | | Batched | | | | • | | | | | |
| | Agency Paid | P | uthorized | | В | atch # | | | Check | Date | | | | |
| | | | | | | | | | Da | ta Classification: 2 | | | | |
| | | Orogo | | and Com | munity Sonvio | oc @ | | | Ja | ta classification. S | | | | |

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 Assistanc | e | Age Cli Reside Client | ncy: C ent: K nce: E ▼ P | OHCS (OR SC ENTERF | ON-OF-RY PRISE, OI m ▼ F | /NAR R 97828 Fiscal ▼ | Mana | geme | ent▼ F | L Time Reports | lser: Tf eout: 1 L | ESTUSEF 9:38 .og Out Help ▼ | Dy | CODM 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. Hov | ver ove | er code | e for full | version | . — | | | | |
| Residence | нн | | | Bold Re | d elem | ents ind | licate poo | or data qu | uality | | | | | | | | | |
| View New | R | SSN/SYSI | YSID Name / | | | Age | Gen | Educ | Vet | Disb | Ethn | Race | NCB | Income | | | | |
| Edit | | SKOR0921 | 12 | KOR SO | OR SON-OF-RYNAR | | | М | PS | Y | N | RF | RF | Y | Y | | | |
| 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 | one at a Loolum | a time): n above, | then Clic | k this bu | ton | Remov | re Clie | nt(s) fr | om Hou | isehold | | | | | |
| Client to HH HH to Residence Merge HH | То | Remove Hou | seholo | d: Click | c this butt | on | | | Move I | 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 chang | ge secoi | ndary so | ort) — | | | | |
| View Kit Component New | Nan | ne Am | ount | | Chk No | | Chk Date | | Aut | Auth # | | Туре | | s | Status | | | |
| | LP14 | \$0. | 00 | | | | | | C16 | 112659 | | Stan | dard | [| Deny | | | |
| | - Pav | ments - Prev | ious H | louse | old (So | rted by I | Name th | en Ai | uth#_cliv | k hear | ler to (| -hange d | econda | rv sort |) —— | | | |
| | Fay | inents - Frev | lous I | lousei | 1010 (301 | rteu by i | Name u | | itii #, tiit | K liea | | inange : | seconda | Ty SUIT | , | | | |
| | Clie | nt Vendor (V | endor | s in re | d are ex | (pired) | | | Income | Summa | ary — | | | | | | | |
| | Ven | dor | Туре | e Pri | Acct# | Nam | ne/Acct | | KOR SON-OF-RYNAR | | | | | \$3,000.00 | | | | |
| | POR | TLAND FRAI | F | Y | y 999-KOR- KOR SON-OF- | | | | KANG SON-OF-AROK | | | \$1,20 | | | \$1,200.00 | | | |
| | ELE | | - | Γ. | 97828 | RYN/ | AR | | Househo | ld Sun | ımary | | | | | | | |
| | | | | | | | | _ | Total Income | | | | \$4,200.00 | | | | | |
| | Add | ress | | | | | | | % of Pov | | | | | 27% | | | | |
| | Т | Address | | | | | | | % of OM | | | | 9% | | | | | |
| | м | 999 PAGH S | ST E. OR (| 97828 | | | | | Total # of Persons | | | | | | | | | |
| | | 1701 VORC | HA AV | E SPC | 3 | | | | НН Туре | | | Co-Habitants | | | * | | | |
| | Ľ | ENTERPRIS | E, OR | 97828 | | | | | Househol | d Subsi | dized | | | | | | | |
| | _ Pho | nes | | | | | | _ | | | Mak | ce any ch | anges? | Save | Changes | | | |
| | Т | Number | | C | lient Na | me | | | HH Comments | | | | | | | | | |
| | w | (503) 988-88 | 88 | ĸ | OR SON- | OF-RYNA | R | | | | | | | | <u> </u> | | | |
| | | | | | | | | | | | | | | | Y | | | |
| | | | | | | | | | 2000 cha | racters | ieft (sp | aces coui | nt) | | | | | |
| | | | | 6 | | | | - 14 | and a | | | | D | ata Cla | ssification: | | | |
| | | | | Ore | gon Hou: | sing and | i Commu | nity S | ervices (| 9 | | | | | | | | |

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

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