# **Section Three**

## Client Intake – Existing

The user will learn how to update and edit existing household records in the OPUS database in this section. These records include client, residence, income, employer, and household summary. Using data-entry screens, all records updated and edited prepare the database to assimilate required information to qualify a household for program assistance.

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

### **<u>Client Search</u>**

Search the OPUS database for existing client information before creating new records and to prevent duplicate records.

### Setup:

On the 'Message of the Day' Screen.

- 1. Click the 'Search Client' link on the 'Left Nav Bar' or from the 'Main Menu' under 'Client'.
- **2.** For each client in the household, and with one search at a time, type a person's first, last name OR SSN/SYSID without dashes (*reference figure 3-1*).

**Note:** The search results will display only 100 records results at random that match the criteria you entered. It's important to provide as much search criteria as possible, so that your results will narrow down to a reasonable number returned records. Or the search results will indicate 'No Results Found'.

**3.** Click the 'Search' Button. The search button becomes activated when information is typed into any of the boxes.

	OPUS	Agency: OHCS	HOME   Log Out
How I have the	Weatherization	Client   Program	Historical   Management   Reports   Help
Client Search View <u>New</u> Edit Residence View	Client Search	Address	Version 2.10.23T (Type "Apt, Unit" etc. with #) #
New Edit	Last Name KIRK	Zip	Show Residence Info. only
Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH	When you Click in Search Client's SSN/SYS= Househ Client's Name = Client Scree Residence Address = Reside A maximum of 100 results w	nold Screen en nce Screen	Show Residences With Jobs only Search

Figure 3-1: Client Search Screen

When the search is successful, the client's information will show in the 'Search Results' section (*reference figure 3-1*). Repeat a search for each client in household. In the 'Search Results', client's system ID, first name, last name, address, city and zip code will display.

	OPUS	Agency: OHCS		HOME   Log Out
10%	Weatherization	Client   Program	Historical   Management	Reports   Help
				Version 2.10.23T
Client <u>Search</u> View New Edit	Client Search		equired, wildcards will be ren	Active
<b>Residence</b> View <u>New</u>	First Name JAMES	*	DOB 03-03-1963	(mm-dd-yyyy)*
Edit Household View Mail/Ph Update	Last Name KIRK SSN/Sys# SJAMESO OPUS will search the databa			Search
NCB Update	Possible Matches		-	
<u>Client to HH</u> HH to Residence	SSN #	First Name	Last Name	DOB
Merge HH		JAMES	KIRK	11-14-1992
		JAMES TIBEROUS	KIRK	09-25-1960
		JAMES	KIRK	01-18-1978
		зони	DOE	02-02-1945
		JAMES R	KRUS	11-16-1978
	SJAMES033063	JAMES	KIRK	03-30-1963
The	link has been left in for an	example SYSID# which i	in not real.	Add New Member
				Timeout: 19:00
				Data Classification: 3
	ommunity Services Site best viewed with Internet Explo			HOME   Logout

Figure 3-2: Client search with results

When a search is unsuccessful, a message 'No Results Found' will display under the 'Search Results'. Be sure to repeat a search for *each client* in the household before adding a client to a household. **Note:** Searching by other fields on the search screen, such as first name or last name can be attempted. Be sure to remove the SYSID/SSN when searching by first and last name. This allows the system to find a person if they have a different ID number.

**4.** Kirk was found in the database. The blue and underlined links in the columns signify links to other screens. After a link has been used, it turns to a dark pink color for a period of time *(reference figure 3-2).* 

The following linked columns take you to respective view screens:

- Click on SSN/SYSID to view 'Household View' screen.
- Click on the first or last name links to view the 'Client View' screen.
- Click on the address, unit or zip to view the 'Residence View' screen.

# The 'Household View' Screen "The Most Useful Screen"

It is recommended that following a client search, to view a client's household View Screen by clicking the client's social security number or system ID number. From the Household View screen, the user will be able to see if there are other client(s) associated with the household (HH). If a user finds household members in a specific HH, the user won't have to search each client individually, since the client was found within the HH and the user will know they have a record in the database. Click Kirk's SYSID to bring up the HH view.

	OPUS	Agency: O	HCS						<u>HOM</u>	<u>1E   Lo</u>	og Out	
	Weatherizat	ion <sup>Client  </sup>	Program	His	torical	Ma	anagem	hent	Repo	orts	Help	
									Ver	sion 2	.10.23T	
Client Search	Househol	d View									Active 📍 1	
View New		SSN/SYSID will open th	he Client Vi	ew Sc	reen.	Н	over o	ver co	de for		ierre ii	
Edit	HH Members R SSN/SYSID	Name									ata quality	
Residence		JAMES KIRK	49		DK			RF	RF	RF	Y	
<u>View</u> New		DR DAVID WILLIS M	ARCUS 23	M	PHD	N	Y	NH	s	Y	Y	
Edit	New Client	o remove a client: Choo	se from R	colum	n, scro	ll dow	n to cli	ick bu	tton.			
Household View	Jobs											
Mail/Ph Update		umber Type	Status		Cost		omple	etion	Date			
NCB Update	Address T U Address				o <mark>me S</mark> ES KIR		iry				\$3,000.00	
Move Client to HH		ATION WAY STE 10F		DR I			IS				\$1,200.00	
<u>HH to Residence</u> <u>Merge HH</u>		ATION WAY STE 10F		Hou	seholo		mary					
	Phones	, OK 97020			il Incor					\$	\$4,200.00	
	T U Number	Client Name			f Pove f OMI	rty					29% 9%	
	H (503) 999-84	22 JAMES KIRK			rOm al # of	Percor					2	
	C (971) 000-11	11 DR DAVID WI	<u>LLIS</u>		Гуре	reisu	15				*	
				Hou	sehold	Subsi	dized					
						Make	any c	hang	es?	Save C	hanges	
				нн	Comm	ents						
	Select client under then Click this butt Remove Client To Remove Hous	ent (one at a time): the R column above, on (s) from Household (s) from Household (s) from Household Click this button Household to Unknown	, 	200	0 chara	acters	left (s	paces	count)		Timeo 19:35 lassification	ut:
Oregon Housing and Co										ном	IE   Logout	
All Rights Reserved   S	iite best viewed with Inte	rnet Explorer 5.5 SP2 or hig	gher									

Figure 3-3: HH view

The 'Household View' screen will appear (*reference figure 3-3*). On Kirk's HH View screen, it displays the following:

1. Kirk's household includes other members.

2. The Kirk' address. If the address on the application is different from what is displayed on the HH view screen, the address will need to be updated. To update the address and/or phone number, click on 'Residence View' from the 'Left Nav Bar'. The 'Residence View' will appear (*reference figure 3-4*).

	OPUS	Agency: OH	cs		ł	HOME   Log Out
	Weatherization	Client	Program	Historical	Management   I	Reports   Help
					١	Version 2.10.23T
Client Search	Residence V	iew				Active 🕈 📥
View New	Physical Address					
<u>New</u> Edit	1701 FEDERATION WAY S	STE 10F				
	ENTERPRISE, OR 97828					
Residence View						
New	Residence Info					
Edit	Status:	Own		Type:	Multi-Unit (Over 4)	
	Primary Energy Source:	ELECTRIC		County:	WALLOWA	
Household						
<u>View</u> Mail/Ph Update						Edit Residence
NCB Update						
	Jobs					
Move	Agency Number	Туре	Status	Cost	Completion Date	
<u>Client to HH</u> <u>HH to Residence</u> Merge HH	New Job					

Figure 3-4: Residence View and Edit

**3.** The HH includes a third person who meets the definition of a HH member. If a new application was to include a fourth person not yet in the system, the HH information would require an update to add another person.

A review of the 'Household View' screen from the initial client search makes it easy and quick to discover any information that would require to be updated. When updating residence information, always search for the <u>new</u> address first. From a residence search, you can determine how to proceed from one of the following scenarios:

- If the residence address is found in the database without a household living in it, the address can be used for the household. Use guidelines in topic **Move Household to Residence**.
- If the address is found in the database with a household in it and the HH is not active in a program, then the "old HH" can be moved into "Unknown" and the new HH can use the address. Use the guidelines in topic **Move Household to Unknown**, and **Move Household to Residence**.
- If a HH is in the system with an old address and the new residence does not exist, it can be added then moved to the HH from the old residence to the new one, using steps in topic **Move Household to a new Residence**. Remember to complete a "Residence Search" before adding a new one.

## **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 the message that the client cannot be moved due to another open enrollment, contact OPUS Helpdesk <u>opushelp@hcs.state.or.us</u>.

### Setup:

On the 'Client Search' screen.

- 1. In the address box, type a street number and street name (with spaces between as needed). If you don't have a street number, 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 Space #.
- 3. Type a city and zip code to narrow the results to this region of the state.

**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 (*reference figure 3-5*).

150	OPUS         Agency: OHCS         HOME   Log Out           Weatherization         Client   Program   Historical   Management   Reports   Help
Client Search View <u>New</u> Edit	Version 2.10.23T Client Search (Type "Apt, Unit" etc. with #)
Edit	
	SSN/SYSID Address %FEDERATION
Residence View	First Name City ENTERPRISE
<u>New</u> Edit	Last Name Zip Dishow Residence Info. only
Household	□ Show Residences With Jobs only
View Mail/Ph Update NCB Update	When you Click in Search Results:     Search       Client's SSN/SYS# = Household Screen     Search       Client's Name = Client Screen     Search
Move <u>Client to HH</u> HH to Residence	Residence Address = Residence Screen A maximum of 100 results will be returned. <u>Advanced Search</u>
Merge HH	Search Results
	SSN # First Name Last Name Birth Year Address Unit City
	No Results Found

Figure 3-5: Client Search

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

• If the residence is not in the result list, you'll see 'No Results Found'. You can begin creating a new household and a new residence (*reference figure 3-7*). 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.

	OPUS	Agenc	<b>у:</b> ОНС	s					ļ	<u>HOME</u>	<u>Log Out</u>
34	Weatherizatio	pn Client	I P	rogram	n   Hi	storical	I I Ma	anageme	ent	Reports	Help
										Version	2.10.23T
ient earch	Household	View									
ew	Household - Click S		en the	Client	View S	creen	H	over ov	ar coda	for full	Active 🏋 🛑 version.
it	HH Members	310/31310 Will 0p	entrie	Client					poor da		
	R SSN/SYSID	Name	Age	Gen	Educ				Race		Income
esidence		JAMES KIRK	49	М	DK	DK	N	RF	RF	RF	Y
<u>ew</u> ew lit	New Client To	remove a client:	Choose	from	R colum	nn, sch	oll dow	n to clic	k buttor	ı.	
	Jobs										
ousehold ew		nber Ty	pe	Stat		Cos			tion Da	te	
ail/Ph Update	Address T U Address					ome S 1ES KI	Summa	iry			\$3,000.00
<u>CB Update</u>		ION WAY STE 10					kk Id Sum				\$3,000.00
love	ENTERPRISE, (					al Inco		тагу			\$3,000.00
lient to HH		ION WAY STE 10	F			of Pove					28%
<u>H to Residence</u> erge HH	ENTERPRISE, (	DR 97828				of OMI	/				8%
erge nn	Phones						f Persor	ns			1
	T U Number	Client Na	me		нн	Туре		[			*
											_
					Ho	usehol	d Subsi	dized			
							Make	any ch	anges?	Save	Changes
					нн	Comr	nents				
	To Remove Housel Move Entire Hou	nold: Click this b usehold to Unknown	utton								A
											-
					200	00 chai	racters	left (sp	aces coi	unt)	
											Timeout 19:46
										Data	Classification:
regon Housing and Co I Rights Reserved   S										Н	ME   Logout

Figure 3-6: HH View with address

- If the residence address is found in the system: the address, city and zip code will be displayed in the results (*reference figure 3-6*). If this address isn't correct, update the residence information in the following order:
  - Create a New Residence
  - Move a Household to New Residence

To complete the 'Move a Household to New Residence', follow the steps in the 'Moves' section titled 'Move household to a New Residence'.

On the Left Nav Bar, click the Residence 'New' link. The 'Residence New' screen will appear (*reference figure 3-8*). Reference **"Section Two; Client Intake, Residence New"** for additional information to create new residences.

	OPUS	Agency: OHCS		<u>H(</u>	OME   Log Out
	Weatherization	Client   Program	Historical   Mana	igement   Re	eports   Help
				V	ersion 2.10.23T
<b>Client</b> Search View	Client Search				
<u>New</u> Edit				(Type "Ap	t, Unit" etc. with #)
$\frown$	SSN/SYSID	Address 1701 FE	DERATION WAY	# STE 10F	
<b>Residence</b> View	First Name	City ENTER	PRISE		
<u>New</u> Edit	Last Name	Zip	Show Resider	nce Info. only	
Household			🗌 Show Reside	nces With Jobs	s only
View Mail/Ph Update NCB Update	When you Click in Search F Client's SSN/SYS# = Househo Client's Name = Client Screen	ld Screen	Search		
Move <u>Client to HH</u> HH to Residence	<u>Residence Address</u> = Residen A maximum of 100 results will		Advanced Search	1	
Merge HH	Search Results				
	SSN # First Name No Results Found	Last Name	Birth Year	Address	Unit City
	pro reconcer o dina				

Figure 3-7: Client Search for residence

	OPUS	Agency	: OHCS			HOME   Log Out
	Weatherization	l Client	Program	Historical	Man agement	Reports   Help
						Version 2.10.23T
Client <u>Search</u> View	Residence 1					Active 📥
<u>New</u> Edit	Physical Address (Fie No. Direction	elds marked with Street Name	n * are requi	red.) Type	Direction Unit	#
<b>Residence</b> View New Edit	City		ST Zip OR			+4 County
<b>Household</b> View Mail/Ph Update NCB Update	<b>Residence Info</b> Residence Type Primary Energy Source		*	Residence Stat	tus	*
Move Client to HH HH to Residence Merge HH	Pasidanas Nau					Save

Figure 3-8: Residence New

### **Verifying Data on Views**

In general, for all view screens, you should review to verify data entered. If information requires to be updated or revised, the 'Edit' link or button is available to update or correct information. Most "View Screens" are for viewing purposes, the <u>one exception</u> is the 'Household View' screen.

## **Residence Edit**

### Setup:

On 'Client View' screen.

1. On the 'Left Nav Bar', click the 'Residence View' link and the 'Residence View' screen will appear next. On the Left Nav bar under 'Residence', click the 'Edit' link. The 'Residence Edit' screen will open. Do not edit the physical address unless the building has physically moved to a new location or the address is incorrect. If the household has moved create a new residence. Edit the required information then click 'Save'. If you do need to edit the physical address you will need to select the 'Edit Residence Address' checkbox. Everything else stays the same as detailed on the client's application (*reference figure 3-9A*).



Figure 3-9: in the Client View

Figure 3-9A: Residence View, Edit

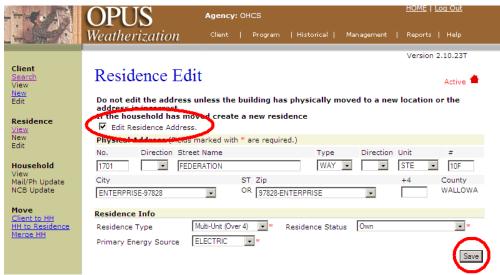


Figure 3-9B: Residence Edit screen

# Add Client(s) to Existing Household

Adding clients to an existing household is easiest when at least one client and the residence have been initially created.

### Setup:

On the 'Search Client' screen, as mentioned in the previous topics, searching for a client who needs to be added to an existing household prevents creating duplicate records. If a search locates clients living in a different household, follow steps in topic **Merge Household with another Household** (*reference figure 3-28*).

### Search Household to Add Client(s) to:

**1.** Search for the household member that needs to be added to the HH. On the 'Search Client' screen, type in the client's name or SSN/SYSID. Click 'Search' button.

	OPUS	Agency: OHCS		HOME   Log Out
-	Weatherization	Client   Program	Historical   Management	Reports   Help
<b>Client</b> Search View New	Client Search			Version 2.10.23T
New Edit Residence View New Edit	SSN/SYSID First Name JAMES Last Name KIRK	Address City Zip	(Type	<pre>only</pre>
Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merce HH	When you Click in Search I Client's SSN/SYS# = Househo Client's Name = Client Screer Residence Address = Residen A maximum of 100 results wil	old Screen n nce Screen	Advanced Search	Jobs only

Figure 3-10: Client Search

**2.** In the results, click the client's SSN number link to access 'Household View' screen (*reference figure 3-11*).

-	<b>OPUS</b>	<b>A</b> g	ency: OHCS			<u>HOMI</u>	E   <u>Log Out</u>
	Weatheriz	ation °	lient   Progi	ram   His	storical   Management	Repo	rts   Help
						Vers	ion 2.10.23T
lient earch iew	Client S	Search					
<u>ew</u> lit					(Тур	e "Apt, U	Init" etc. with #)
anc -	SSN/SYSID		Address		#		
esidence ew	First Name	JAMES	City				
<u>ew</u> it		KIRK					
ic .	Last Name 🕴		Zip		Show Residence Info		
ousehold				 	Show Residences Wit	h Jobs or	nly
ail/Ph Update		ick in Search Res SYS# = Household S			Search		
CB Update	Client's Name	= Client Screen dress = Residence S					
ove		f 100 results will be		A	dvanced Search		
ient to HH I to Residence							
arge HH	Search Resul		Leeb News	Birth Year	0 ddaaaa	L Los its	le in a
	SSN #	First Name JAMES	<u>Last Name</u> KIRK	1992	373 E LOGSDEN RD	Unit	City SILETZ
		JAMES	KIRK	1957	312 E 4TH ST		THE DALLES
					<u>512 E 41H 51</u>		THE DALLES
		JAMES R	KIRK	1965			[
		JAMES	KIRKLAND	1955	382 17TH ST SE		SALEM
		JAMES	KIRK	<u>1968</u>			
		JAMES TIBEROUS	KIRK	<u>1960</u>	431 OLIVE ST NW		SALEM
		JAMES	<u>kirk</u>	<u>1978</u>	1111 MAIN ST	APT 205	KLAMATH FALLS
		JAMES	KIRKPATRICK	<u>1976</u>			
	SJAMES03306	3 D. MES	KIRK	1963	1701 FEDERATION WAY	STE 10F	ENTERPRISE
			1		1 <u></u>	1	Timeo
							19:56
						Da	

- Figure 3-11: Client Search New with results
- **3.** Under the 'HH Members' section, click the 'New Client' button (*reference figure 3-12*). The 'Client Search New' screen will appear next.

	OPUS	Agency: OHCS						HOM		iq Out	
- Jeffe	Weatherization	Client   Prog	ram  ⊦	listorical	м	anagen	nent	Repo	orts	Help	
								Vers	ion 2.	.10.23T	
Client Search	Household V	View								active 🕈 📥	
<u>View</u> New	Household - Click SSN	/SYSID will open the Cli	ent View :	Screen.	H	over o	ver co	de for t			
Edit	HH Members			Bold	Red e	lemen	nts indi	cate po	or da	ta quality	
		ame	Age (	Gen Edu	: Vet	Disb	Ethn	Race	NCB	Income	
Residence	AC DA	MES KIRK	49 N	1 DK	DK	N	RF	RF	RF	Y	
<u>View</u> New	D DF	R DAVID WILLIS MARCU	S 23 N	1 PHD	Ν	Y	NH	s	Y	Y	
Edit	New Client To ren	nove a client: Choose fro	om R colu	mn, scro	ll dow	n to cl	ick but	ton.			
H <b>ousehold</b> √iew	Jobs	er Type S	tatus					_			
Mail/Ph Update	Agency Numb	Cost			etion	Date					
ICB Update	Address T. H. Address		come Su		iry				3,000.00		
love	M 1701 FEDERATIO	D	JAMES KIRK DR DAVID WILLIS						\$1,200.00		
<u>Client to HH</u> HH to Residence	ENTERPRISE, OR P 1701 FEDERATIO			MARCUS Household Summary					\$1,200.00		
<u>lerge HH</u>	ENTERPRISE, OR			otal Incor		initian y			¢	4,200.00	
	Phones			% of Poverty					29%		
	T U Number	Client Name		of OMI	cy.					9%	
	H (503) 999-8422	JAMES KIRK		Total # of Persons			2				
	C (971) 000-1111	DR DAVID WILLIS MARCUS	н	НН Туре				*			
			н	ousehold	Subsi	dized					
					Make	e any d	change	s?	Gave Cł	hanges	
			н	H Comm	ents						
	To Remove a Client ( Select client under the F then Click this button Remove Client(s) fror	t column above, n Household d: Click this button									
	Move Entire Household to Unknown			2000 characters left (spaces count)							
										Timeout: 6:30	
								D	ata Cl	assification: 3	
Pregon Housing and Co Il Rights Reserved   S	mmunity Services ite best viewed with Internet E	xplorer 5.5 SP2 or higher							ном	E   Logout	

Figure 3-12: HH view, New Client button

	OPUS	Agency: OHCS		F	IOME   Log Out
	Weatherization	Client   Pro	gram   Historical	Management   F	Reports   Help
				\ \	/ersion 2.10.23T
Client					
<u>Search</u> View	Client Search	New			Active 🕈 📥
New	Current Household Mem	bers			
Edit	SSN/SYSID	Name		Gen	
		JAMES KIRK		M	49
Residence View		DR DAVID WILL	IS MARCUS	М	23
New	New Client Information	Fields marked with	* are required, wildca	rds will be removed	4)
Edit					
Household	First Name CAROLE	*	DOB 04	-03-1966	n-dd-yyyy)*
View					. dd <i>11111</i>
Mail/Ph Update NCB Update	Last Name MARCUS	*	(	Create ID	
	SSN/Sys#	*			Search
Move					
Client to HH HH to Residence	OPUS will search the databa	ase to find this client	t before creating a new	w record.	
Merge HH					
	Possible Matches				
	SSN # First N		Last Name		DOB
	CHER	YL	MARQUEZ	C	4-21-1964
	CARL	A PAOLA	MARQUEZ-MONTERO	1	2-28-1991
	<u> </u>				
					Add New Member
					$\sim$
					Timeout: 19:02
					Data Classification: 3
Oregon Housing and Co All Rights Reserved   S	- ommunity Services Site best viewed with Internet Explo	rer 5.5 SP2 or higher			HOME   Logout
<b>FI 34</b>	<b>A</b> 1 1 1 <b>XXXX</b> 1	~ .			

Figure 3-13: Add new HH member Search

On the Client Search New screen, under 'Possible Matches', clients will appear if the name and or SSN/SYSID number is close to the search criteria entered. If the 'Possible Matches' do not match the client in question, click on the 'Add New Member' button. The 'Client New' screen will appear. *Fields marked with \* require responses to be selected.* 

- **4.** Type or select the following:
  - Title, Salutation, as needed.
  - Legal first name, middle name, last Name \*.
  - Date of Birth.
  - SSN or choose SYSID instead.
  - SSN Quality Code \* This is to describe if the SSN is full or 'don't know/don't have' or 'refused' for system identification.
  - Phone number is the same as the others in HH, should not have to re-enter.
  - Gender \*
  - Disabled \*
  - Veteran \*
  - Language
  - Ethnicity \*
  - Education.
  - Homebound
  - Mailing Address \*

In the example above (*reference figure 3-13*), the mailing address will be the same as the others in the household. Address selections can be made from the drop-down menu previously entered for other clients in household and skip the steps below.

- Street Number, Street Name, Street Direction such as: S, N, NE, NW, etc.
- Street Type such as: Ave, Lane, etc.
- Unit Type such as: Apt, Unit, Bldg, PO Box, etc., # for and apt number or PO Box #
- Enter an apt number or PO Box number
- City or Zip Code
- Non-Cash Benefits the client currently receives.
- Click the 'Save' Button to save the client information (*reference figure 3-14, next page*).

#### The 'Client New' screen is on the next page alone to capture all the details.

	OPUS Agency: OHCS		HOME   Log Out
	Weatherization Client   Pro	ogram   Historical   Management	Reports   Help
			Version 2.10.23T
Client Search	Client New		Active 🌹 📥
View <u>New</u>	Client Information (Fields marked with * are	e required.)	Active 🕷 💻
Edit	Title		
Residence View	First Name CAROLE *	Middle	
New Edit	Last Name MARCUS *		-
	DOB 04-03-1966 (mm-dd-yyy		* Create ID
Household <u>View</u>	DOB 104-03-1300 mm(mm-00-333)		W OR DON'T HAVE • *
Mail/Ph Update NCB Update	Phone	Soli Quality Code [Doin 1 Mil	WON DON'T HAVE 1
Move	Primary Phone HOME - (503) 999-8422 💌 OR e	nter new number below.	
<u>Client to HH</u> HH to Residence Merge HH	Primary Phone 503-555-121	2 EXT Type HOME	×
	Mailing Address *		
	(Choose an address from menu, OR enter a n		
	1701 FEDERATION WAYSTE 10F - ENTERPRISE OF No. Direction Street Name	Type Direction	Unit #
	City ST Z	ip	County
	• OR	• +4	
	Client Characteristics		
	Gender FEMALE	▼* Disabled REFU	SED 💌 *
	Veteran NO •*	Ethnicity REFUSED	*
	Language	Education	•
	Homebound	Transportation?	
	Race (Check all that apply)*		
	🗌 African American	C Don't Know	
	American Indian/Alaska Native	Refused	
	Asian		
	Native Hawaiian or Pacific Islander	Oregon Tribes	
	L white	I	
	Non-Cash Benefits (Check all that apply)*		
	□ SNAP □ Oregon Health		None
	WIC VA Med Serv TANF Trans Other TANF	TANF Child Care Public Rental Assist	O Don't Know O Refused
	☐ Other Health Ins ☐ Other Source	Temp Rental Assist	
	Does this client have any	■ Pemp Rental Assist	Save
	income?		Timeout: 18:02
			Data Classification: 3
Oregon Housing and Co	mmunity Services		HOME   Logout
	te best viewed with Internet Explorer 5.5 SP2 or higher		

Click the 'Save' button.

	<b>OPU</b>	S	Agency: OHC	s		HOME	<u>Loq Out</u>
	Weatheri	zation	Client   P	rogram   Hi	storical   Manag	ement   Reports	Help
						Version	2.10.23T
<b>lient</b> earch	Client	View					
iew	Chem	VICW					Active X
<u>ew</u> dit	Client Infor			Select Ano	ther Client in HH 🛛	CAROLE MARCUS	- Go
	Name	CAROLE MAI	RCUS	SSN/SY	S ID#	SSN DOC D	
esidence							
i <u>ew</u> ew	DOB	04-03-1966		<b>Age</b> 46			
dit	Phone	503-999-842	2	Туре НО	ME Edit		Delete
ousehold	Phone				Type CELL	▼ * Add	
ew				Ext	Type JUELL	• • 100	
<u>ail/Ph Update</u> CB Update	Mailing Add						
	ENTERPRISE,	TION WAY STE	Cour	tv WALLO			
love lient to HH	ENTERPRISE,	OR 97626	Cour	ity WALL	JVVA		
H to Residence	Client Chara	cteristics					
erge HH	Gender	FEMALE	Language	UNKNO	WN Educati	on UN	KNOWN
	Veteran	NO	Disability	REFUSE	D Homeb	ound UN	KNOWN
	Ethnicity	REFUSED	Race	REFUSE	D Oregon	Tribe	
					Edit Client Vier	v Household	
	Non-Cash B	enefits					
	N SNAP		N Oregon Healt		N MEDICARE	N WIC	
	N VA Med Se N Public Rent		N TANF Child C N Other Health		N TANF Trans N Other Source	N Other TANF	LAssist
		ai Assist	in jourier riealur	1115	IN Jourier Source	IN Fremp Kenta	Assist
	Jobs Agency	Number	Туре	Status	Cost Com	letion Date	
				o Income, Do		ed will delete all in	come)
		ent have any inc				ve	
	Type Sou		Monthly		Verified Date	Last 30 Days	Exclude
		Total	\$0.00	\$0.00			
							Timeout 19:45
						Data	Classification:

Figure 3-15: HH member view selection

Double-check the information to ensure it is correct. On the 'Client View' screen, a user can select another household member from the top right drop-down menu called 'Select Another Client in HH'. This is an easy way to get to another HH member 'Client View' screen if information requires to be updated, (*reference figure 3-15*). The figure below shows in detail the HH selection (*reference figure 3-15A*).

	OPU	S	Agency	<b>/:</b> 0	HCS			<u>HO</u>	ME   Log Out	
	Weather	ization	Client		Program	Historical	Mana	igement   Rej	oorts   Help	
Client	Client	View						Ve	rsion 2.10.231	
<u>Search</u> View <u>New</u> Edit					Select	: Another Cli	ent ir HH	JAMES KIRK	Active	<b>X</b> ] <u>Go</u>
	Name	JAMES KIRK			SSN	I/SYS ID# 3	SJAMEROS	CAROLE MARCI	JS IS MARCUS	
Residence View New	DOB	03-30-1963			Age	49		DITURNUD WILL	10 14/11/000	
Edit	Phone	503-999-8422	2		Тур	e HOME	Edit		De	elete
Figure 3-1	5 <b>A:</b> HH m	ember view :	select	ion						

## **<u>Client Edit</u>**

### Setup:

On the 'Client View' screen, working with the dropdown box 'Select Another Client in HH'.

	OPUS	A	gency: (	онся			HOME   Lo	<u>a Out</u>
·	Weatheriza	tion	Client I	Program	Historical	Management	:   Reports	Help
FIT ALL AND CONTRACT	weatheriza	nion						
							Version 2.	10.23T
Client	Client V							
<u>Search</u> View	Chent v	lew		/			A	ning 🕅
New				Selec	t Another Cli	ent in HH JAME		Go Go
Edit	Client Informa						S KIRK	
Residence	Name	JAMES KIRK		55	N/SYS ID# 3	DR DA	VID WILLIS MARC	US
<u>View</u> New	DOB	03-30-1963		Ag	<b>e</b> 49			
Edit	Phone	503-999-8422		Ту	pe HOME	Edit		Delete
Household	Phone		*	Ex	t T	ype CELL	▼ * Add	
View	Mailing Addres	is						
Mail/Ph Update	1701 FEDERATIO	ON WAY STE 10F	-					
NCD Opdate	ENTERPRISE, OF	8 97828	c	County	WALLOWA			
Move Client to HH HH to Residence Merge HH				-				
	Client Charact							
	Gender	MALE	Lan	guage	UNKNOWN	Education		NWON
		DON'T KNOW		ability	NO	Homebou		NWON
	Ethnicity	REFUSED	Rac	e	REFUSED	Oregon Tr		
			C < C < C < C < C < C < C < C < C < C <		Edit Cli	ent 💦 📄 ew Ho	usehold	
	Non-Cash Ben	efits						
	N SNAP			lealth Plan	N MED		WIC	
	N VA Med Serv N Public Rental		TANF Chi Other He		N TANF		Other TANF Temp Rental As	niet
		Assist IN	other he	aiur fris	IN JOUIE	i source in	Tremp Kentar As	5151
	Jobs Agency	Number	Туре	Statu	s Cost	Completio	on Date	
		1		_				
	Income/Emplo			Zero Incom	ie, Don't Knov		Il delete all incor	ne)
	Does this client	have any incom	ie? YES			<ul> <li>Save</li> </ul>		
	Туре	Source/Emp		Monthly	Annual		Last 30 Days	
	UNEMPLOYMENT	STATE OF OR	EGON	\$250.00	\$3,000.00	07-03-2012	Y	N
	New Income		Total	\$250.00	\$3,000.00			
								Timeout: 17:56
							Data Cla	assification: 3
	ommunity Services							Logout

Figure 3-16: Client view to edit information

1. Once the correct name is selected, click the 'Go' button. The 'Client View' screen will appear next. On the Left Nav Bar, click the 'Client Edit' link, *or* click the 'Edit Client' button under the 'Client Information' section (*reference figure 3-16*). The 'Client Edit' screen will appear next (*reference figure 3-16A*).

	OPUS Agency: OHCS
	Weatherization Client   Program   Historical   Management   Reports   Help
	Version 2.10.23T
Client Search	Client Edit
<u>View</u> <u>New</u> Edit	Client Information (Fields marked with * are required.)
Residence	Title
View New	First Name JAMES * Middle
Edit	Last Name KIRK * Suffix
Household <u>View</u>	DOB 03-30-1963 (mm-dd-yyyy)* SSN/Sys# Create ID SSN Quality Code DON'T KNOW OR DON'T HAVE • *
Mail/Ph Update NCB Update	SSN Quality Code DON'T KNOW OR DON'T HAVE 💌 *
Move	Mailing Address * (Choose an address from the list, add a new address, or edit the current mailing address below)
<u>Client to HH</u> <u>HH to Residence</u> Merge HH	Edit Current Mailing Address
Merge HH	
	No.     Direction     Street Name     Type     Direction     Unit     #       1701     Image: FEDERATION     WAY     Image: STE image
	City ST Zip County
	ENTERPRISE-97828 OR 97828-ENTERPRISE +4 WALLOWA
	Client Characteristics
	Gender MALE Visabled NO Visabled
	Veteran DONT KNOW * Ethnicity REFUSED *
	Language Education
	Homebound Transportation?
	Race (Check all that apply)*
	African American     O Don't Know
	American Indian/Alaska Native     O Refused     Asian
	Asian     Native Hawaiian or Pacific Islander     Oregon Tribes
	White
	$\sim \sim \sim$

Figure 3-16A: Client Edit screen

**2.** On the 'Client Edit' screen, all fields will be in **edit mode** for information to be corrected or changed. Certain drop-down boxes contain information that was entered for the other HH members. If this information is correct, it can be chosen or the information can be manually added (*reference figure 3-16A*).

If the phone number needs to be updated, dashes <u>do not</u> need to be typed in. As the tab button is used to exit a cell, OPUS will automatically insert the dashes, (*reference figure 3-16A*).

When the information has been verified and correct, click the 'Save Changes' button at the bottom of the screen (*reference figure 3-16B*). The 'Client View' screen will appear with the most current changes.

	OPUS	Agency: OHCS		HOME   Log Out
	Weatherization	Client   Program	Historical   Management	Reports   Help
				Version 2.10.23T
Client <u>Search</u> <u>View</u> <u>New</u> Edit	Client Edit Client Information (Fiel	ds marked with * are require	d.)	Active 🕈 📥
	Title	$\geq$	$\sim$	$\sim$
	Non-Cash Benefits (Ch	eck all that apply)*	$\sim$	
	SNAP	Oregon Health Plan	MEDICARE	None
	U MIC	🗖 VA Med Serv	TANF Child Care	Don't Know
	TANF Trans	Other TANF	Public Rental Assist	Refused
	✓ Other Health Ins	Other Source	Temp Rental Assist	
				Save Changes
				11:48
				Data Classification: 3
	ommunity Services Site best viewed with Internet Exp			HOME   Logout

Figure 3-16B: Client Edit 'Save Changes'

## **Income Edit/Employer or Delete Income/Employer**

### Setup:

**1.** On the 'Client View' screen, use "Select Another Client in HH" to select the required HH member whose information requires to be updated. The 'Client View' screen will appear next (*reference figure 3-17*).

	OPUS	3	Agency:	OHCS			HOME   Loc	<u>1 Out</u>
	Weatheriz	zation	Client	Program	Historical	Management	Reports	Help
							Version 2.1	0.227
							version 2.1	10.251
Client Search	Client	View						
View	Chem							
<u>New</u> Edit				Sele	ct Another Cli	ent in HH JAME	S KIRK	- Gol
Lunc	Client Inform							
Residence	Name	JAMES KIRK	C	SS	N/SYS ID#		SSN DQC DK	
<u>View</u>	DOB	03-30-1963		Ag	<b>e</b> 49			
New Edit	Phone	503-999-843	22	Ту	pe HOME	Edit		Delete
Household	Phone		*	Ex	t Ty	pe CELL	▼ * Add	
<u>View</u>	Mailing Addr	ess						
<u>Mail/Ph Update</u> NCB Update	1701 FEDERAT	TION WAY STE	10F					
NCB Opdate	ENTERPRISE,	OR 97828		County	WALLOWA			
Move								
<u>Client to HH</u> HH to Residence Merge HH	Client Chara	cteristics						
	Gender	MALE	Lan	guage	UNKNOWN	Education	UNKN	IOWN
	Veteran	DON'T KNOV	V Dis	ability	NO	Homebou	nd UNKN	IOWN
	Ethnicity	REFUSED	Rac	e	REFUSED	Oregon Tr	ibe	
					Edit Cli	ent View Ho	usehold	
	Non-Cash Be	nefits						
	Y SNAP		Y Oregon I	Health Plan	N MED	ICARE N	WIC	
	N VA Med Ser		N TANF Ch		N TANF		Other TANF	
	N Public Rent	al Assist	Y Other He	ealth Ins	N Othe	r Source N	Temp Rental As	sist
	Jobs							
	Agency	Number	Туре	statu	s Cost	Completio	on Date	
	Income/Em	oloyer (Setting	j to No, No -	Zero Incon	ne, Don't Know	w or Refused wi	Il delete all incon	ne)
	Does this clie	nt have any ind	come? YES			- Save		
	Type	Source/E		Monthly	Annual	Verified Date	Last 30 Days	Exclude
	UNEMPLOYME	NT STATE OF	OREGON	\$250.00	\$3,000.00	07-03-2012	Y	N
	New Income		Total	\$250.00	\$3,000.00			
			Total	\$250.00	\$3,000.00			
								Timeout: 19:58
							Data Cla	ssification: 3
Oregon Housing and Co All Rights Reserved   S		n Internet Explore	er 5.5 SP2 or	higher			HOME	.   Logout

Figure 3-17: Client View Edit income/employer

2. To edit income or an employer, click the link for the type of income on the 'Client View' screen. The 'Income & Employer Edit' screen will appear. Some cells require manual input and some cells have drop-down boxes to choose information from. Make appropriate changes or updates as needed. Click the 'Save' button (*reference figure 3-18*). The 'Client View' screen will re-appear. Note: *Fields marked with \* are required for an income source to be saved*.

	OPUS	Agency: OHCS		HOME   Log Out
	Weatherization	Client   Program	Historical   Management	Reports   Help
				Version 2.10.23T
Client <u>Search</u> <u>View</u> New	Income/Emp	bloyer Edit with * are required for an inc	ome source to be saved.)	Active 🕈 📥
Edit	Source/Employer Name		Amount	
<b>Residence</b> <u>View</u> New Edit	STATE OF OREGON Frequency Monthly	UNEMPLOYMENT Verified How Unemployment Docs 💌 *	Verified By Verified Date EJR * 07-03-2012	(mm-dd-yyyy)*
Household <u>View</u> Mail/Ph Update NCB Update	Income received in past Don't Use This Record W Comments (MAX 2000 o	hen Creating Payments 🛛		
Move Client to HH HH to Residence Merge HH	2000 characters left (spa	ces count)		
	Employer Information	l		
	Phone	Ext		
	Address			
	Address 1			
	Address 2			
	City, State Zip			$\neg$
	Delete			Save
				Timeout: 19:31
				Data Classification: 3
Oregon Housing and Co All Rights Reserved   S	ommunity Services Site best viewed with Internet Exp	plorer 5.5 SP2 or higher		HOME   Logout

Figure 3-18: Income & Employer Edit screen

Click the 'Save' button when complete.

**3.** To delete an income, click on the 'Delete' button. A "Windows Internet Explorer" confirmation will appear with the question **"Are you sure you want to delete the selected income?"** If the income is to be deleted, click the 'OK' button. If the income *is not* to be deleted, click 'Cancel' (*reference figure 3-19, deleting income*).

	OPUS	Agency: OHCS		HOME   Log Out
	Weatherization	Client   Program	Historical   Management	Reports   Help
				Version 2.10.23T
Client Search View	Income/Emp	•		Active 🕈 📥
New Edit	Income (Fields marked v Source/Employer Name	with * are required for an ind Type	come source to be saved.) Amount	
Residence View	STATE OF OREGON Frequency	UNEMPLOYMENT Verified How	verified By Verified Date	
New Edit	Monthly *	Unemployment Docs 💌 *		(mm-dd-yyyy)*
Household	Income received in past	30 days? 🗹 hen Creating Payments 🔲		
<u>View</u> <u>Mail/Ph Update</u> <u>NCB Update</u>	Comments (MAX 2000 d	- ·		
Move Client to HH HH to Residence Merge HH	2000 characters le	age from webpage	elete the selected income?	×
	Employer Inforn	ок с	ancel	
	Address			
	Address 1			
	Address 2			
	City, State Zip			Save
	$\smile$			
				Timeout: 17:35
				Data Classification: 3
	ommunity Services Site best viewed with Internet Exp	olorer 5.5 SP2 or higher		HOME   Logout

Figure 3-19: Income & Employer delete

**4.** If a new income needs to be added, click the 'New Income' button. Note: Complete all required information using the same steps used to edit client information. Click the 'Save' button when complete (*reference figure 3-18*).

### **Moves**

There are six different ways to process moves in OPUS:

- 1. Move Client(s)/Household to Unknown
- 2. Move Client (s) to Household
- **3.** Move/Adding Client(s) to Existing Residence
- 4. Move Household to New Residence
- 5. Move Household to Existing Residence
- 6. Merge Household with another Household

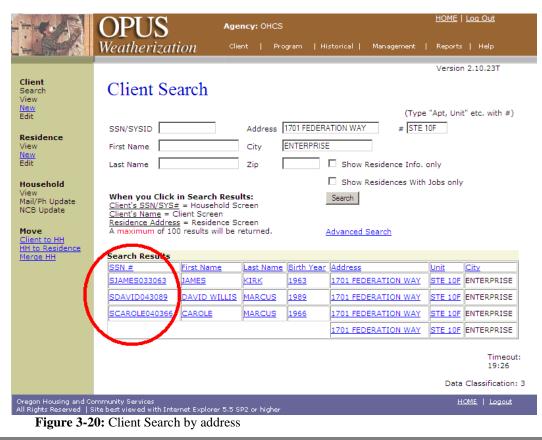
The following examples demonstrate move scenarios.

### Move Client(s)/Household to Unknown

Jean-Luc Picard submitted his application for assistance. Searching the database using the client's SSN, Jean-Luc Picard was not in the database. A search for the client's current address: 1701 Federation Way, Enterprise, OR 97828 was completed and found the address in the database with a different client identified as Lisa and Steven Adams.

### Setup:

1. On the 'Client Search' screen, enter Paul Morgan's address and click the 'Search' button. The 'Search Results' indicates James Kirk, David Marcus and Carole Marcus affiliated with the address. Click on James's SSN to get to the 'Household View' screen (*reference figure 3-20*).



2. This HH needs to be moved from the existing address which is being occupied by James Kirk. To move the family from the residence, click on 'Move Entire Household to Unknown' (*reference figure 3-21*).

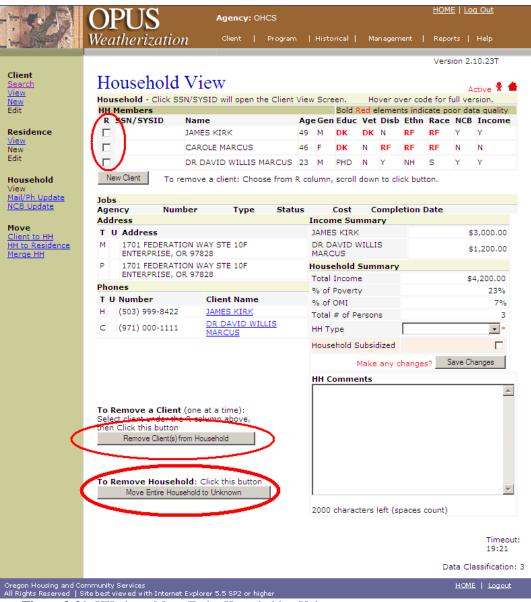


Figure 3-21: HH view. Move Entire Household to Unknown.

The HH view screen stands alone to show where the 'Move' buttons are located.

**3.** To remove individual client(s) from HH select the clients corresponding radio button *(reference figure 3-21).* and click on 'Remove Client(s) from Household' button *(reference figure 3-21).* 

**4.** The database will require the user to confirm they want to move the HH to unknown. Click the 'OK' button to complete the move to unknown. When the HH has been moved out of the residence, the HH address will appear as 'unknown' (*reference figure 3-22*).

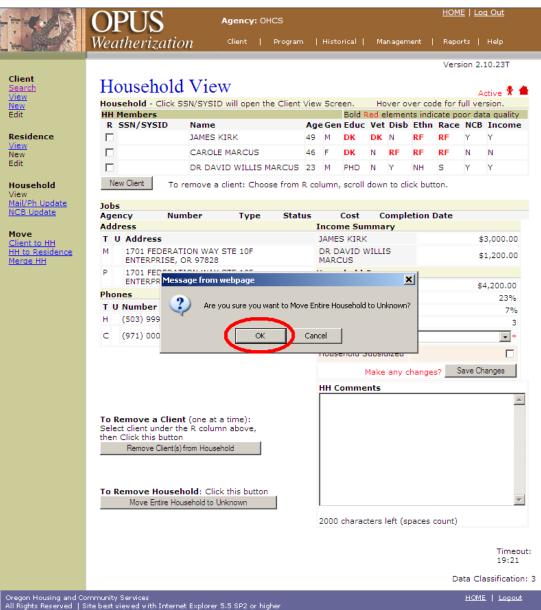


Figure 3-22: HH View. Move HH to unknown. Address shows 'unknown'.

## **Move Client to Household**

**1.** To move a new client to a household, use 'Client Search New. Enter the required client information and click on 'Search' button (reference figure 3-23A). Click on the SSN# link for the corresponding client (reference figure 3-23A).

	OPUS ^	gency: OHCS		HOME   Log Out
H. M.	Weatherization	Client   Program   ⊢	iistorical   Management	Reports   Help
				Version 2.11.0T
Client <u>Search</u> View	Client Search Ne	ew		Active
New Edit	New Client Information (Field	s marked with * are requ	ired, wildcards will be rem	oved)
Residence View	First Name JEAN-LUC	8	DOB 11-11-1911	(mm-dd-yyyy)*
<u>New</u> Edit	Last Name PICARD	8:	Create ID	
Household View	SSN/Sys# SJEAN-L111112	ais .		Search
Mail/Ph Update NCB Update	OPUS will search the database to	) find this client before cr	eating a new record.	
Move	Possible Matches			
<u>Client to HH</u> HH to Residence Merge HH	SSN #	First Name JEAN-LUC		0 <u>0B</u> 1-11-1911
		·		Add New Member
				Timeout: 18:03
				Data Classification: 3
Oregon Housing and Co All Rights Reserved   S	ommunity Services Site best viewed with Internet Explorer 5.	5 SP2 or higher		HOME   Logout

Figure 3-23A: Client Search New

2. The 'Client View' Screen will appear. Click on the 'Client to HH' link on the left nav bar under 'Move' (*reference figure 3-23B*).



Figure 3-23B: Client View

**3.** You should now be at the 'Move Client' Screen. Enter the Clients FROM information and the TO household information and click the Search Button (*reference figure 3-24A*).

	OPUS	Agency: OHCS			HOME   Log Out
	Weatherization	Client   Program	Historical	Management	Reports   Help
					Version 2.11.0T
Client Search View Edit Residence View New Edit Household View Mail/Ph Update NCB Update Client to HH HH to Residence Merge HH	Move Client To Move: Enter into search fields for clie From the results below - Make then click button at end of page NOTE: One or more clients ca but only ONE household can b Client(s) FROM - Enter at lead SSN1 SJEANL111111 SSN2 SSN3 First JEAN-LUC Last PICARD	e selections under the <b>M</b> ge, to "Move Client(s) to n be moved, se selected to move clier	column, on lef Household". ht(s) into. <b>TO</b> Household	t and right sides, d - Enter at least of MESO33063 ES	Active 🕈
					Timeout: 18:50
					Data Classification: 3
Oregon Housing and Co All Right's Reserved 1.3	ommunity Services Site best viewed with Internet Explorer	5.5 SP2 or bigher			HOME   Logout

Figure 3-24A: Move Client

**4.** Select the radio button corresponding to the client to be moved and then select the corresponding radio button for the client household to be moved to. The click the 'Move Client(s) to Household' button (*reference figure 3-24B*).

	OPUS	Agency: OHCS		ļ	HOME   <u>Log Out</u>
	Weatherization	Client   Program	Historical   Mana	gement   I	Reports   Help
				, ,	Version 2.11.0T
Client Search View New Edit Residence View New Edit Household View Mail/Ph Update NCB Update	Move Client To Move: Enter into search fields for clie From the results below - Make then click button at end of pag NOTE: One or more clients car but only ONE household can be Client(s) FROM - Enter at leas SSN1 SJEANL111111 SSN2	selections under the <b>M</b> e, to "Move Client(s) to be moved, e selected to move clie	I column, on left and ri Household".	r at least on	Active 🕈
Move Client to HH <u>HH to Residence</u> <u>Merge HH</u>	SSN3 First JEAN-LUC Last PICARD Select M column to move (sel M SSN First	· · · · ·	Last KIRK Select M column to r M SSN	nove (select First	
	M SSN First	Last PICARD	SJAMES033063	JAMES	Last KIRK
	(		t(s) to Household Screen will appear nex		Timeout: 18:58 <u>Data Classification:</u> 3
Oregon Housing and Co All Rights Reserved   S	ommunity Services Site best viewed with Internet Explorer (	5.5 SP2 or higher			HOME   Logout

Figure 3-24B: Move Client

**5.** The database will require the user to confirm they want to move the selected client(s). Click the 'OK' button to complete the move (*reference figure 3-24C.*) The client(s) have been moved to the new HH, the 'Household View' screen will appear reflecting the new household configuration (*reference figure 3-24D*).

	OPUS	Agency: OHCS		<u>HC</u>	ME   Log Out
	Weatherization	Client   Program	Historical   Manage	ement   Re	ports   Help
				Ve	ersion 2.11.0T
Client Search View Edit Residence View New Edit	Move Client To Move: Enter into search fields for cli From the results below - Make then click button at end of pay NOTE: One or more clients ca but only ONE household can b	e selections under the <b>M</b> ge, to "Move Client(s) to n be moved,	column, on left and rig Household".	ht sides,	Active 🕈
Household	Client(s) FROM - Enter at lea	ist one	TO Household - Enter		
View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH	First JEAN-LU Last PICARE	rom webpage Are you sure you want to n			Search
	Select M column to M SSN	ОКС		ove (select o First	nly one more) Last
	SJEANL11111 JEAN-LU	C PICARD	<u>^</u>	JAMES	KIRK
			r(s) to Household Screen will appear next)		Timeout: 18:24
					Data Classification: 3
Oregon Housing and Co All Rights Reserved   S	ommunity Services Site best viewed with Internet Explorer	5.5 SP2 or higher			HOME   Logout
E: 2.0	$A \cap O^{1} \to M$				

Figure 3-24C: Client Move - Verification

1.03	$\mathbf{O}$	PU	S		Agency:	OHCS							HOI		<u>oq Out</u>
	Wea	ther	izatio	n	Client	Progra	m	Histo	orical	Ma	nagem	ent	Rep	orts	Help
													Ver	sion 2	2.11.0T
ent	п		hold	<b>X7</b>											
arch w	п	ouse	noia	V 10	ew										Active 🕈 🕯
N				SN/SYS	ID will oper	n the Clier	t Vie	w Scr							ersion.
:		Membe SSN/S		Name			•	• C • •							ata quality B Income
sidence		55N/5	1510		□ LUC PICARI	n	_	D M	MA	Y	Y	NH	S	Y	Y
<u>w</u>						0				, DK			-		
v					S KIRK			м	DK			RF	RF	Y	Y
				CARO	LE MARCUS	;	46	F	DK	N	RF	RF	RF	N	N
usehold				DR D	AVID WILLI	S MARCUS	3 23	м	PHD	N	Y	NH	s	Y	Y
w I <u>/Ph Update</u> B <u>Update</u>	Ne	ew Client	Ton	emove	a client: Ch	noose from	n R co	olumn	, scroll	dowr	n to cli	ck but	ton.		
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ve ent to HH	CCN	ncy	Number TESTJOE		Туре ВОТН	Statu PEND			Cos \$3,8	t 50.0	0		pletio 3-2020		le
to Residence	CCN	1	TESTJOE		WX ONLY	COMP		-	\$1,0	00.0	D		-2012		
<u>ge HH</u>		ress							ne Su		ry				
		U Addro							S KIRK		-				\$3,000.00
	м		ESS UNKI RPRISE, O		8			DR D MAR	AVID \ CUS	VILLI	5				\$1,200.00
	м	UNKN						Hous	ehold	Sum	mary				
			RPRISE, O					Total	Incom	е					\$4,200.00
	P		FEDERATI RPRISE, O		Y STE 10F			% of	Povert	y					18%
	Pho		(FRISE, C	/K 9/02	.0			% of	OMI						6%
		l Numb	er		Client Nam	e		Total	# of P	ersor	IS				4
	c		555-9422		CAROLE MA			нн т	уре			2-Pa	rent		*
	С		555-9422		JAMES KIRK			Hous	ehold S	ubsi	dized				
	н	(503) 9	999-8422		JAMES KIRK	<u> </u>								C	Changes
	С	(800) 5	555-9422		JEAN-LUC P	ICARD				маке	any c	hange	s?	Save	Indriges
	С	(503) 9	999-9999		JEAN-LUC P	ICARD		нно	omme	nts					
	н	(503) 5	555-1212		JEAN-LUC P										<u></u>
	С	(800) 5	555-9422		<u>DR DAVID N</u> MARCUS	NILLIS									
	С	(971) (	000-1111		DR DAVID V	WILLIS									
															¥
	Sele	ct client Click th	under the his button	e R colu	it a time): imn above,	1		2000	charad	ters	left (sj	paces	count)	)	
	 To F	Remove		old: C	ick this butt	ion									
		Move	Entire Hous		-										
	_	Move	Entire Hous												Timeou 18:39
		Move	Entire Hous											Data C	

Figure 3-24D: Household View - Move Completed

# **Moving-Adding Existing Client(s) to Existing Residence**

1. To move an existing client to an existing residence, locate the designated client who is being moved (*reference figure 3-25*) and Click on SSN link open up 'Household View' (*reference figure 3-25A*). Click on 'HH to Residence' link in the 'Left Nav Bar'. The 'Move Household to Residence' screen will appear (*reference figure 3-25B*).

	Agency: OH	CS				
Weatherization	Client	Program   Histor	rical   Managem	ient   Repo	rts   Help	
Client Search				Vers	ion 2.10.23T	
SSN/SYSID First Name JEAN-LUC Last Name PICARD	Address City Zip		#		Init" etc. with #)	
<u>Client's SSN/SYS</u> = House <u>Client's Name</u> = Client Scre <u>Residence Address</u> = Resid A maximum of 100 results	shold Screen sen ence Screen	Se	arch	s With Jobs o	nly	
SSN #		Last Name	Birth Year	Address	Unit City	
ommunity Services				<u>∥</u> D≀	Timeout: 19:58 ata Classification: 3 HCME   Logout	
	Client Search         SSN/SYSID         First Name         JEAN-LUC         Last Name         PICARD         When you Click in Search         Client's SSN/SYS# = House         Search Results         SSN #         SISN #	SSN/SYSID       Address         First Name       JEAN-LUC       City         Last Name       PICARD       Zip         When you Click in Search Results:       Client's SSN/SYS* = Household Screen         Client's SSN/SYS* = Household Screen       Residence Address         Residence Address       = Residence Screen         A maximum of 100 results will be returned.         Search Results       SSN #         SISALIIIIII       JEAN-LUC	Client Search         SSN/SYSID       Address         First Name       JEAN-LUC       City         Last Name       PICARD       Zip         When you Click in Search Results:       Se         Client's SSN/SYS#       = Household Screen         Client's Name       Client Screen         Residence Address       Residence Screen         A maximum of 100 results will be returned.       Adv         Search Results       Se         SISN #       First Name         SISAN #       First Name         SIGEANLI11111       JEAN-LUC	SSN/SYSID       Address       #         First Name       JEAN-LUC       City       #         Last Name       PICARD       Zip       Show Residence         Last Name       PICARD       Zip       Show Residence         Client's SSN/SYS#       = Household Screen       Search         Client's SSN/SYS#       = Household Screen       Search         Residence Address       = Residence Screen       Advanced Search         A maximum of 100 results will be returned.       Advanced Search         SSN #       First Name       Last Name       Birth Year         SISANL111111       DEAN-LUC       PICARD       1911	Client Search         SN/SYSID       Address       #	Version 2.10.23T         Client Search         SSN/SYSID

Figure 3-25: Move existing client search



Figure 3-25A: Move existing client to existing residence

	OPUS	Agency: OHCS		HOME   Log Out
	Weatherization	Client   Progran	n   Historical   Management	Reports   Help
				Version 2.10.23T
Client Search View New Edit Residence View Household View Mail/Ph Update NCB Update Move Client to HH HH to Residence Merge HH	Choose HH and Residence in to "Move Household to Resid NOTE: Only ONE household o FROM Household	existing household to results, then click but ence".	move to an existing residence. ton at end of this page,	Active A # STE !OF Search
				Timeout: 18:32
				Data Classification: 3
Oregon Housing and Co All Rights Reserved   S	ommunity Services Site best viewed with Internet Explore	er 5.5 SP2 or higher		HOME   Logout

Figure 3-25B: Move Household to Residence

Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Residence' information, click 'Search' (*reference figure 3-25B*).

2. The client(s) to be moved 'FROM Household' and the 'TO Residence' information will appear. Check the appropriate box(es) to complete the move. Click on 'Move Client(s) to Household' button (*reference figure 3-26*). Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected household?

	OPUS	Agen	cy: OHCS			HOME   Log Out	
	Weatherization		t   Prog	am   Historical	Management	Reports   Help	
						Version 2.10.23T	
Client Search View New Edit Residence View New Edit Household View Mail/Ph-Update NCB Update	Move Household Enter in search fields fi Choose HH and Reside to "Move Household to NOTE: Only ONE house FROM Household SSN First JEAN-LUC	or an existing nce in results, Residence". shold can be m e.g. 000- e.g.	household t then click t nove to ONE 00-0000 . John	o move to an exist utton at end of this residence. TO Residence Address 17 City EN	01 FEDERATION	Active <b>*</b>	
Move Client to HH HH to Residence Merae HH	Last PICARD Select ONLY one HH, U M SSN	Inder the M co First JEAN-LUC	Last PICARD Move H		# C RATION STE EI 10F	Search Ider the M column. City Zip NTERPRISE 97828 Timeout:	
						18:22 Data Classification: 3	
Oregon Housing and Co All Rights Reserved   S	ommunity Services Site best viewed with Internet	Explorer 5.5 SP2	2 or higher			HOME   Logout	

Figure 3-26: Move Household to Residence

**3.** Click 'OK' if the client(s) are correct to complete the move (*reference figure 3-26A*).

Message	from webpage	X
?	Are you sure you wan	t to move the selected household?
	ОК	Cancel

Figure 3-26A: Confirmation to move to HH to Residence

4. The 'Household View' screen will appear with the client moved (*reference figure 3-26B*).

								V	ersion	2.10.23T
<b>ient</b> earch	Househ	nold Vi	ew							
ew			SID will open th	e Client Vie	w Screen	Hov	er over	code fo	or full y	Active 🏋 1
<u>ew</u> lit	HH Members		oro will open al	e chene vie		d elements				
	R SSN/SYS	5ID Nan	ie	Age Gen	Educ	Vet Disb	Ethn	Race	NCB	Income
sidence		JEAN	I-LUC PICARD	100 M	MA	Y Y	NH	s	Y	Y
<u>ew</u> w lit	New Client	To remov	e a client: Choo	se from R c	olumn, so	roll down t	o click	button.		
ousehold	Jobs Agency	Number	Туре	Status	Co	st Cou	nnleti	on Date	2	
ew	Address	Humber	1700	Status		old Summ		on Duit	-	
<u>ail/Ph_Update</u> CB_Update	T U Addres	s			Total Inc	come				\$0.00
<u>ob opdate</u>		DERATION W			% of Po	verty				0%
ove		RISE, OR 97			% of OM	II				0%
<u>ient to HH</u> I to Residence		DERATION W RISE, OR 97			Total # (	of Persons				1
erge HH	Phones	nabey one sys	20		НН Туре		s	ingle		* *
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	H (503) 55	5-1212	JEAN-LUC PICA	ARD .		Make a	nv cha	nges?	Save	Changes
					HH Con		ny ena	inges.		
						ments				*
		<b>tousehold</b> : ntire Household	Click this button to Unknown			aracters le				*

Figure 3-26B: Household view, clients merged.

# **Move Household to Existing Residence**

In 'Household View', in the Left Nav Bar, **#1**, click 'Mail/Ph Update' link. Check and/or fill in the appropriate information to be updated in 'Household Mail and Phone Update' screen then **#2**, click 'Update Mailing Changes'. "Windows Internet Explorer" will request confirmation 'Are you sure you want to Update Household information? Click **#3**, 'OK'. The clients in the HH will be updated at the same time with the same address (*reference figure 3-27*).

	Agency: OHCS	HOME   Log Out
	Weatherization Client   Program   Historical   Management	Reports   Help
		Version 2.10.23T
Client <u>Search</u> <u>View</u> New	Household Mail and Phone Update	Active 🕈 📥
Edit	Update Mailing Address for Household (Choose an address from menu, OR enter a new	w one below) *
Residence View	No. Direction Street Name Type Direction	Unit #
New Edit	1701 FEDERATION WAY V	STE 💌 10F
Eult	City ST Zip	County
Household	ENTERPRISE-97828 OR 97828-ENTERPRISE +4	WALLOWA
#1 <u>View</u> Mail/Ph Update	Update Mailing Address #2	
NCB Update		
Move	Modify Phones for Household (Add HH will add the phone to all clients in the househ delete all phone for all clients in the household.)	old. Delete HH will
Client to HH	JEAN-LUC PICARD	
HH to Residence Merge HH	Phone: 503-555-1212 Type: HOME Edit Delete	
	Phone: * Ext: Type: CELL • * Add Add HH	Delete HH
		J J
	Message from webpage	
	Message from webpage	
	Are you sure you want to update Mailing address for the entire Household?	
	#3 OK Cancel	
	#3 OK Cancel	Timeout: 15:25
		Data Classification 2
		Data Classification: 3
Oregon Housing and Co All Rights Reserved   \$	Community Services Site best viewed with Internet Explorer 5.5 SP2 or higher	HOME   Logout
Figure 3-27	7: Merge HH to Residence	

# **Merge Household with Another Household**

**1.** In 'Household View' locate the household you want to merge with another household. On the Left Nav Bar, click 'Merge HH' link (*reference figure 3-28*).



Figure 3-28: HH View after merge.

#1, fill in the 'Move FROM' 'Merge TO' then: #2, click "Search'. Check the appropriate circle(s) to be updated, #3, click 'Merge Households'. "Windows Internet Explorer" will request confirmation 'Are you sure you want to Update Household information? #4, click 'OK'. The clients in the from HH will be updated at the same time.

	OPUS	Ag	ency: OHCS		HOME   Log Out
1.10%	Weatherizati	on a	ient   Program	Historical   Management	Reports   Help
	meanerizan	on			
Client Search View New Edit Residence View New Edit Household View Mail/Ph. Update NCB. Update	Merge Ho To Merge: Enter into fields to a From search Result then click button, at Enter HH to Move I SSN First JAMES Last KIRK	search Househo s, choose HHs t end of page, '	ds olds to merge. on left and rigt	Are you sure you want to me 44 OK C Enter HH ternenge TO 25N First JEAN-LUC Last PICARD #1	¥ rge the selected households? ancel #2 Search
Move Client to HH					
HH to Residence	FROM (select only M SSN	y one) First	Last	TO (select only one) M SSN First	Last
Merge HH	0	JAMES	KIRK		
	0	JAMES	KIRK		
	SJAMES03306	3 JAMES	KIRK		
	0	JAMES	KIRK		
		#3	_	e Households Screen will appear next)	
					Timeout: 19:26
					Data Classification: 3
Oregon Housing and Co All Rights Reserved 1.8	mmunity Services ite best viewed with Inter	not Evoloror <del>E E</del>	SD2 or bighor		HOME   Logout
	IH View processi		or z or nighter		

3. The Household View screen appears. The merge is completed (*reference figure 3-28B*).

	0	PUS	5	Age	ency: OH	s							<u>HOM</u>	<u>E   Lo</u>	<u>q Out</u>
	Wea	theriz	ation	Cli	ent	Program	<u> </u>	Histo	orical	Ma	nagem	nent	Repo	rts	Help
													Vers	ion 2.	10.23T
lient earch	H	ouseh	old V	iew											
lew lew			Click SSN/S		l open the	Client	View	/ Scre	en.	Но	ver o	ver co	de for f		ctive 🏋 1 rsion.
dit	нн	Members													ta quality
		SSN/SYS					_								Income
esidence iew				N-LUC P			100		MA	Y	Y	NH	s	Y	Y
ew			JAM	ES KIRK	C		49	м	DK	DK	N	RF	RF	Y	Y
dit			CAR	ROLE MA	RCUS		46	F	DK	Ν	RF	RF	RF	N	N
ousehold			DR	DAVID \	VILLIS MA	RCUS	23	М	PHD	N	Y	NH	s	Y	Y
iew Iail/Ph Update CB Update	Ne	ew Client	To remov	ve a clier	nt: Choose	e from I	R col	lumn,	scroll	dowr	n to cli	ck but	ton.		
<u>es opune</u>	Jobs														
love	_	ency Iress	Number		Туре	Stat			Cost			etion	Date		
lient to HH H to Residence		U Addres	-						<b>ne Su</b> S KIRK		гу			e	3,000.00
lerge HH	м	ADDRES	S UNKNOWI RISE, OR 97						AVID		s				1,200.00
	M 1701 FEDERATION WAY STE 10F							lous	ehold	Sum	mary				
	P 1701 FEDERATION WAY STE 10F						_	Total	Incom	е				\$	4,200.00
	P		DERATION V RISE, OR 97		10F			% of	Povert	y					19%
	Pho			020				% of OMI Total # of Persons							6%
	ти	J Number		Client	Name			Total	# of P	ersor	IS				4
	н	(503) 999	9-8422	JAMES	KIRK			нн ту	/pe						*
	н	(503) 555	5-1212	JEAN-L		<u>RD</u>		House	ehold S	Subsid	dized				
	С	(971) 000	0-1111	DR DA	VID WILL	IS				Make	any c	hange	s? S	ave Ch	anges
				<u>Inanco</u>	<u></u>			нн с	omme			-	_		
	Sele	ect client ur i Click this	Client (one ider the R co button Client(s) from H	olumn at											
	To F		ousehold: tire Household			]		2000	charad	ters	left (sj	paces			Timeo 17:30
													_		
													Da	ta Cla	assification

Figure 3-28B: HH merge completed.

4. Update mailing address for Household (*reference figure 3-29*).

In 'Household View', in the Left Nav Bar, **#1**, click 'Mail/Ph Update' link. Selected the appropriate mailing address from the dropdown **#2**, then **#3**, click 'Update Mailing Changes'. "Windows Internet Explorer" will request confirmation 'Are you sure you want to Update Household information? Click **#4**, 'OK'. The clients in the HH will be updated at the same time with the same address (*reference figure 3-29*).

	OPUS	Agency: OHCS	i -	F	IOME   Log Out
	Weatherization	Client   Pr	ogram   Historical	Management   F	leports   Help
				V	/ersion 2.10.23T
Client Search View New	Household M	ail and Ph	one Update		Active 🕈 📥
Edit	Undate Mailing Address for			u, OR enter a new	one below) *
Residence View New Edit	1701 FEDERATION WAYSTE 1 1701 FEDERATION WAYSTE 1 ADDRESS UNKNOWN - ENTER	0F - ENTERPRISE OR RPRISE OR, 97828	#2	Direction	Unit #
<b>Household</b> View	ADDRESS UNKNOWN - ENTER ADDRESS UNKNOWN - ENTER RES 17011 CSCRATION WAY Update Mailing Address	REPRISE OR 97828	SE OF, 07628	• +4	County
Move Client to HH	Hodify Phones for House delete all phone for all clien JAMES KIRK			nts in the househo	old. Delete HH will
<u>HH to Residence</u> <u>Merge HH</u>	Phone: 503-999-8422		Type: HOME	Edit Delete	
	Phone:	Ext:	Type: CELL 💽	Add Add HH	Delete HH
	DR DAVID WILLIS MARCO	JS			
	Phone: 971-000-1111		Type: CELL	Edit Delete	
	Phone:	Ext:	Type: CELL	Add Add HH	Delete HH
	CAROLE MARCUS				
	Phone:	Ext:	Type: CELL 💽	Add Add HH	Delete HH
	JEAN-LUC PICARD				
	Phone: 503-555-1212		Type: HOME	Edit Delete	
	Phone:	Ext:	Type: CELL	Add Add HH	Delete HH
	Message from webpag		ailing address for the entire I	Household?	Timeout: 11:51
Oregon Housing and Co All Rights Reserved   S		ОК	Cancel		Data Classification: 3

Figure 3-29: Update Household Mailing