

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 been covered for confidentiality purposes even though the test database was used.

Client Search

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 Weatherization Agency: OHCS HOME | Log Out
Client | Program | Historical | Management | Reports | Help
Version 2.10.23T

Client Search

(Type "Apt, Unit" etc. with #)

SSN/SYSID Address #

First Name City

Last Name Zip Show Residence Info. only

Show Residences With Jobs only

[Advanced Search](#)

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

Client Search
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/PH Update
NCB Update

Move
[Client to HH](#)
[HH to Residence](#)
[Merge HH](#)

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.

Agency: OHCS

HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Client Search New

Active

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

First Name: JAMES * DOB: 03-03-1963 (mm-dd-yyyy)*

Last Name: KIRK * Create ID

SSN/Sys#: SJAMES033063 * Search

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

Possible Matches

SSN #	First Name	Last Name	DOB
	JAMES	KIRK	11-14-1992
	JAMES TIBEROUS	KIRK	09-25-1960
	JAMES	KIRK	01-18-1978
	JOHN	DOE	02-02-1945
	JAMES R	KRUS	11-16-1978
SJAMES033063	JAMES	KIRK	03-30-1963

Add New Member

Timeout: 19:00

Data Classification: 3

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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.

The screenshot displays the 'Household View' interface for client JAMES KIRK. The header includes the OPUS Weatherization logo, Agency: OHCS, and navigation links like HOME, Log Out, Client, Program, Historical, Management, Reports, and Help. The version is 2.10.23T.

Household View (Active)

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

HH Members (Bold Red elements indicate poor data quality)

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JAMES KIRK	49	M	DK	DK	N	RF	RF	RF	Y
<input type="checkbox"/>		DR DAVID WILLIS MARCUS	23	M	PHD	N	Y	NH	S	Y	Y

New Client | To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date
Address					
T U	Address			Income Summary	
M	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828			JAMES KIRK	\$3,000.00
				DR DAVID WILLIS MARCUS	\$1,200.00
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828			Household Summary	
				Total Income	\$4,200.00
				% of Poverty	29%
				% of OMI	9%
				Total # of Persons	2
				HH Type	[Dropdown]
				Household Subsidized	<input type="checkbox"/>

Phones

T U	Number	Client Name
H	(503) 999-8422	JAMES KIRK
C	(971) 000-1111	DR DAVID WILLIS MARCUS

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

HH Comments

2000 characters left (spaces count)

Make any changes? Save Changes

Timeout: 19:35

Data Classification: 3

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HOME | Logout

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.

- 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).

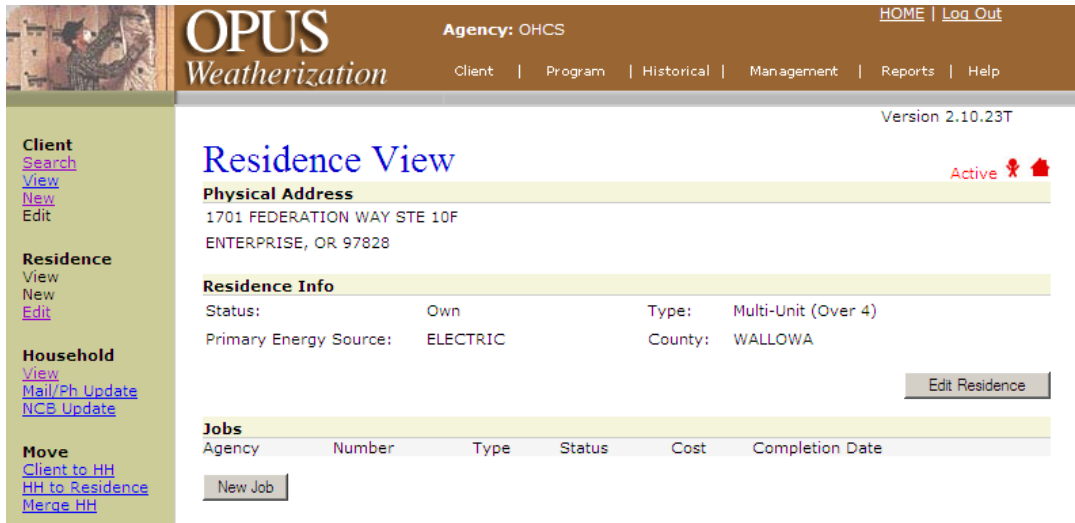


Figure 3-4: Residence View and Edit

- 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 *new* 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 *cannot* be moved from the HH without being exited from the ‘other’ open enrollment. The OPUS user can search other modules he/she has access to or contact their agency’s OPUS Administrator for assistance. If the agency does not have access to another module and receives the message that the client cannot be moved due to another open enrollment, contact OPUS Helpdesk opushelp@hcs.state.or.us.

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*).

The screenshot shows the OPUS Weatherization Client Search interface. The header includes the OPUS logo, the text 'Weatherization', and the agency name 'OHCS'. There are navigation links for 'Client', 'Program', 'Historical', 'Management', 'Reports', and 'Help'. The version number '2.10.23T' is displayed. The main content area is titled 'Client Search' and contains several input fields: 'SSN/SYSID', 'Address' (with a red circle around it containing '%FEDERATION'), 'First Name', 'City' (containing 'ENTERPRISE'), 'Last Name', and 'Zip'. There are also checkboxes for 'Show Residence Info. only' and 'Show Residences With Jobs only', and a 'Search' button. Below the search fields, there is a section titled 'When you Click in Search Results:' with links for 'Client's SSN/SYSID', 'Client's Name', and 'Residence Address'. A note states 'A maximum of 100 results will be returned.' and there is a link for 'Advanced Search'. At the bottom, there is a 'Search Results' table with columns for 'SSN #', 'First Name', 'Last Name', 'Birth Year', 'Address', 'Unit', and 'City'. The table currently shows '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.

The screenshot shows the 'Household View' for a client named James Kirk. The address '1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828' is circled in red. The interface includes a navigation menu on the left, a top header with 'Agency: OHCS', and various data sections like HH Members, Jobs, Address, Income Summary, Household Summary, and HH Comments.

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JAMES KIRK	49	M	DK	DK	N	RF	RF	RF	Y

Agency	Number	Type	Status	Cost	Completion Date
T	U	Address			
M		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828			
P		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828			

T	U	Number	Client Name

Income Summary

JAMES KIRK	\$3,000.00
------------	------------

Household Summary

Total Income	\$3,000.00
% of Poverty	28%
% of OMI	8%
Total # of Persons	1
HH Type	[Dropdown]
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Timeout: 19:46
Data Classification: 3

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.

Figure 3-7: Client Search for residence

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 *one exception* 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

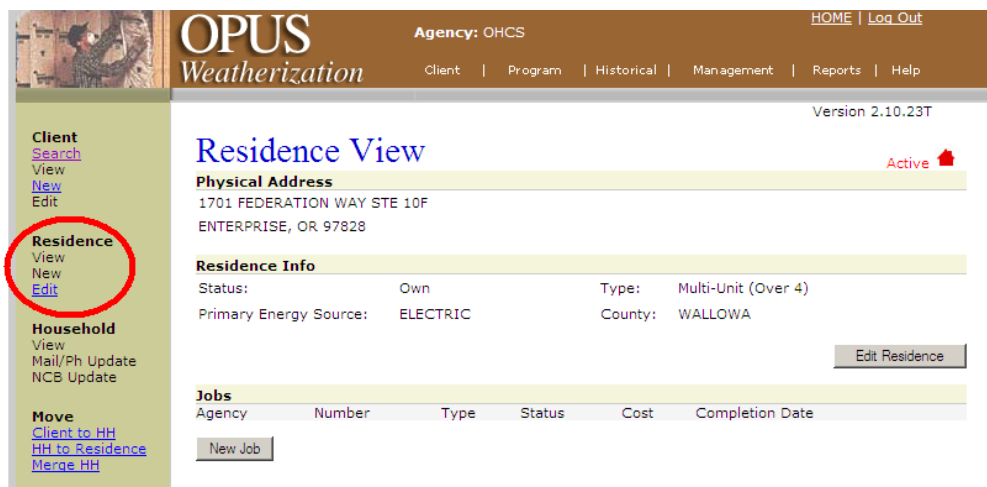


Figure 3-9A: Residence View, Edit

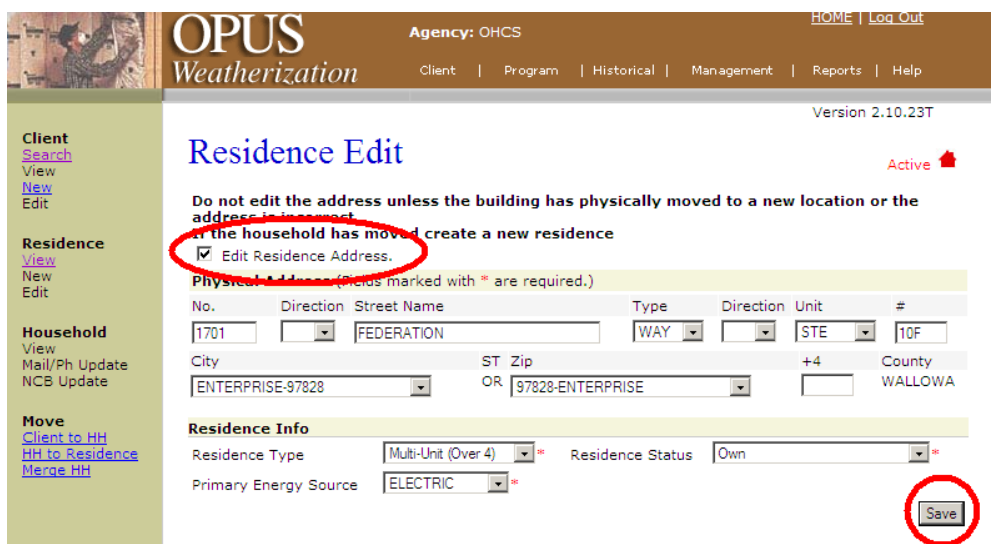


Figure 3-9B: Residence Edit screen

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 Weatherization Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Client Search

(Type "Apt, Unit" etc. with #)

SSN/SYSID Address #

First Name City

Last Name Zip Show Residence Info. only

Show Residences With Jobs only

When you Click in Search Results:
[Client's SSN/SYS#](#) = Household Screen
[Client's Name](#) = Client Screen
[Residence Address](#) = Residence Screen
A maximum of 100 results will be returned.

[Advanced Search](#)

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](#)

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).

OPUS Weatherization Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Client Search

(Type "Apt, Unit" etc. with #)

SSN/SYSID Address #

First Name City

Last Name Zip Show Residence Info. only

Show Residences With Jobs only

When you Click in Search Results:
 Client's SSN/SYS# = Household Screen
 Client's Name = Client Screen
 Residence Address = Residence Screen
 A maximum of 100 results will be returned. [Advanced Search](#)

Search Results

SSN #	First Name	Last Name	Birth Year	Address	Unit	City
[Link]	JAMES	KIRK	1992	373 E LOGSDEN RD		SILETZ
[Link]	JAMES	KIRK	1957	312 E 4TH ST		THE DALLES
[Link]	JAMES R	KIRK	1965			
[Link]	JAMES	KIRKLAND	1955	382 17TH ST SE		SALEM
[Link]	JAMES	KIRK	1968			
[Link]	JAMES TIBEROUS	KIRK	1960	431 OLIVE ST NW		SALEM
[Link]	JAMES	KIRK	1978	1111 MAIN ST	APT 205	KLAMATH FALLS
[Link]	JAMES	KIRKPATRICK	1976			
SJAMES033063	JAMES	KIRK	1963	1701 FEDERATION WAY	STE 10F	ENTERPRISE

Timeout: 19:56
Data Classification: 3

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Figure 3-11: Client Search New with results

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

OPUS Weatherization Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Household View

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

HH Members Bold Red elements indicate poor data quality

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JAMES KIRK	49	M	DK	DK	N	RF	RF	RF	Y
<input type="checkbox"/>		DR DAVID WILLIS MARCUS	23	M	PHD	N	Y	NH	S	Y	Y

New Client To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date												
Address																	
T	U	Address															
M		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828		JAMES KIRK	\$3,000.00												
				DR DAVID WILLIS MARCUS	\$1,200.00												
P		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828		Household Summary													
<table border="1"> <tr> <td>Total Income</td> <td>\$4,200.00</td> </tr> <tr> <td>% of Poverty</td> <td>29%</td> </tr> <tr> <td>% of OMI</td> <td>9%</td> </tr> <tr> <td>Total # of Persons</td> <td>2</td> </tr> <tr> <td>HH Type</td> <td><input type="text"/></td> </tr> <tr> <td>Household Subsidized</td> <td><input type="checkbox"/></td> </tr> </table>						Total Income	\$4,200.00	% of Poverty	29%	% of OMI	9%	Total # of Persons	2	HH Type	<input type="text"/>	Household Subsidized	<input type="checkbox"/>
Total Income	\$4,200.00																
% of Poverty	29%																
% of OMI	9%																
Total # of Persons	2																
HH Type	<input type="text"/>																
Household Subsidized	<input type="checkbox"/>																
<p>Make any changes? <input type="button" value="Save Changes"/></p> <p>HH Comments</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>2000 characters left (spaces count)</p>																	

Phones

T	U	Number	Client Name
H		(503) 999-8422	JAMES KIRK
C		(971) 000-1111	DR DAVID WILLIS MARCUS

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

Timeout: 6:30
Data Classification: 3

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HOME | Logout

Figure 3-12: HH view, New Client button

Agency: OHCS

HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Client Search New

Active

Current Household Members

SSN/SYSID	Name	Gender	Age
	JAMES KIRK	M	49
	DR DAVID WILLIS MARCUS	M	23

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

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

Last Name *

SSN/Sys# *

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

Possible Matches

SSN #	First Name	Last Name	DOB
	CHERYL	MARQUEZ	04-21-1964
	CARLA PAOLA	MARQUEZ-MONTERO	12-28-1991

Timeout: 19:02

Data Classification: 3

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HOME | Logout

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 Weatherization Agency: OHCS HOME | Log Out
 Client | Program | Historical | Management | Reports | Help
 Version 2.10.23T

Client New Active

Client Information (Fields marked with * are required.)

Title
 First Name * Middle
 Last Name * Suffix
 DOB (mm-dd-yyyy) * SSN/Sys# *
 SSN Quality Code *

Phone

Primary Phone OR enter new number below.
 Primary Phone 503-555-1212 EXT Type

Mailing Address *

(Choose an address from menu, OR enter a new one below)

No.	Direction	Street Name	Type	Direction	Unit	#
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

City ST Zip County
 OR +4

Client Characteristics

Gender * Disabled *
 Veteran * Ethnicity *
 Language Education
 Homebound Transportation?

Race (Check all that apply) *

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

Non-Cash Benefits (Check all that apply) *

SNAP Oregon Health Plan MEDICARE None
 WIC 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

Does this client have any income? *

Timeout: 18:02
 Data Classification: 3

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 HOME | Logout

Figure 3-14: HH Client New

Click the 'Save' button.

OPUS Weatherization Agency: OHCS HOME | Log Out
 Client | Program | Historical | Management | Reports | Help
 Version 2.10.23T

Client View Select Another Client in HH **CAROLE MARCUS** Active Go

Client Information

Name CAROLE MARCUS SSN/SYS ID# SSN DQC DK

DOB 04-03-1966 Age 46

Phone 503-999-8422 Type HOME Edit Delete

Phone * Ext * Type CELL * Add

Mailing Address

1701 FEDERATION WAY STE 10F
 ENTERPRISE, OR 97828 County WALLOWA

Client Characteristics

Gender FEMALE Language UNKNOWN Education UNKNOWN
 Veteran NO Disability REFUSED Homebound UNKNOWN
 Ethnicity REFUSED Race REFUSED Oregon Tribe

Edit Client View Household

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Income/Employer (Setting to No, No - Zero Income, Don't Know or Refused will delete all income)

Does this client have any income? NONE Save

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

Timeout: 19:45
 Data Classification: 3

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 HOME | Logout

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).

OPUS Weatherization Agency: OHCS HOME | Log Out
 Client | Program | Historical | Management | Reports | Help
 Version 2.10.23T

Client View Select Another Client in HH **JAMES KIRK** Active Go

Client Information

Name JAMES KIRK SSN/SYS ID# SJAME303

DOB 03-30-1963 Age 49

Phone 503-999-8422 Type HOME Edit Delete

JAMES KIRK
 CAROLE MARCUS
 DR DAVID WILLIS MARCUS

Figure 3-15A: HH member view selection

Client Edit

Setup:

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

OPUS Weatherization Agency: OHCS HOME | Log Out
Client | Program | Historical | Management | Reports | Help
Version 2.10.23T

Client View

Client Information

Name: JAMES KIRK SSN/SYS ID: JAMESUS CAROL E MARCUS
DOB: 03-30-1963 Age: 49
Phone: 503-999-8422 Type: HOME Edit Delete
Phone: []* Ext: [] Type: CELL* Add

Mailing Address

1701 FEDERATION WAY STE 10F
ENTERPRISE, OR 97828 County: WALLOWA

Client Characteristics

Gender: MALE Language: UNKNOWN Education: UNKNOWN
Veteran: DON'T KNOW Disability: NO Homebound: UNKNOWN
Ethnicity: REFUSED Race: REFUSED Oregon Tribe: []

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
[]					

Income/Employer (Setting to No, No - Zero Income, Don't Know or Refused will delete all income)

Does this client have any income? YES Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
UNEMPLOYMENT	STATE OF OREGON	\$250.00	\$3,000.00	07-03-2012	Y	N
New Income		Total				
		\$250.00	\$3,000.00			

Timeout: 17:56
Data Classification: 3

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HOME | Logout

Figure 3-16: Client view to edit information

- 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 Weatherization Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Client Edit

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

Title: []

First Name: JAMES * Middle: []

Last Name: KIRK * Suffix: []

DOB: 03-30-1963 (mm-dd-yyyy) * SSN/Sys#: [] * Create ID

SSN Quality Code: DONT KNOW OR DONT HAVE *

Mailing Address *
(Choose an address from the list, add a new address, or edit the current mailing address below)

Edit Current Mailing Address: []

Homeless

No.	Direction	Street Name	Type	Direction	Unit	#
1701	[]	FEDERATION	WAY	[]	STE	10F

City: ENTERPRISE-97828 ST: OR Zip: 97828-ENTERPRISE +4 County: WALLOWA

Client Characteristics

Gender	MALE *	Disabled	NO *
Veteran	DONT KNOW *	Ethnicity	REFUSED *
Language	[]	Education	[]
Homebound	[]	Transportation?	[]

Race (Check all that apply) *

African American Don't Know

American Indian/Alaska Native Refused

Asian

Native Hawaiian or Pacific Islander

White

Oregon Tribes: []

Figure 3-16A: Client Edit screen

- 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 *do not* 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.

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Weatherization

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HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Client Edit

Client Information (Fields marked with * are required.)

Active

Non-Cash Benefits (Check all that apply)*

- SNAP
- Oregon Health Plan
- MEDICARE
- None
- WIC
- 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

Timeout: 11:48

Data Classification: 3

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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*).

Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

Version 2.10.23T

Client View

Select Another Client in HH JAMES KIRK Go

Client Information

Name JAMES KIRK SSN/SYS ID# SSN DQC DK
 DOB 03-30-1963 Age 49
 Phone 503-999-8422 Type HOME Edit Delete
 Phone Ext Type CELL Add

Mailing Address

1701 FEDERATION WAY STE 10F
 ENTERPRISE, OR 97828 County WALLOWA

Client Characteristics

Gender MALE Language UNKNOWN Education UNKNOWN
 Veteran DON'T KNOW Disability NO Homebound UNKNOWN
 Ethnicity REFUSED Race REFUSED Oregon Tribe

Edit Client View Household

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date	
Income/Employer (Setting to No, No - Zero Income, Don't Know or Refused will delete all income)						
Does this client have any income? YES Save						
Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
UNEMPLOYMENT	STATE OF OREGON	\$250.00	\$3,000.00	07-03-2012	Y	N
New Income		Total	\$250.00	\$3,000.00		

Timeout: 19:58
 Data Classification: 3

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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.



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*).

The screenshot displays the 'Income/Employer Edit' page in the OPUS Weatherization system. The page header shows 'Agency: OHCS' and 'Version 2.10.23T'. The left sidebar contains navigation links for Client, Residence, Household, and Move. The main form area includes the following fields and options:

- Income** (Fields marked with * are required for an income source to be saved.)
- Source/Employer Name: STATE OF OREGON
- Type: UNEMPLOYMENT
- Amount: 250
- Frequency: Monthly
- Verified How: Unemployment Docs
- Verified By: EJR
- Verified Date: 07-03-2012
- Income received in past 30 days?
- Don't Use This Record When Creating Payments
- Comments (MAX 2000 characters)
- Employer Information section with fields for Phone, Address 1, Address 2, and City, State Zip.

A modal dialog box titled 'Message from webpage' is overlaid on the form, asking 'Are you sure you want to delete the selected income?' with 'OK' and 'Cancel' buttons. The 'Delete' button on the form and the 'OK' button in the dialog are circled in red.

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*).

OPUS Weatherization Agency: OHCS

Client | Program | Historical | Management | Reports | Help

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Client Search

SSN/SYSID [] Address 1701 FEDERATION WAY # STE 10F (Type "Apt, Unit" etc. with #)

First Name [] City ENTERPRISE

Last Name [] Zip [] Show Residence Info. only

Show Residences With Jobs only

Search

When you Click in Search Results:
Client's SSN/SYS# = Household Screen
Client's Name = Client Screen
Residence Address = Residence Screen
A maximum of 100 results will be returned. [Advanced Search](#)

SSN #	First Name	Last Name	Birth Year	Address	Unit	City
SJAMES033063	JAMES	KIRK	1963	1701 FEDERATION WAY	STE 10F	ENTERPRISE
SDAVID043089	DAVID WILLIS	MARCUS	1989	1701 FEDERATION WAY	STE 10F	ENTERPRISE
SCAROLE040366	CAROLE	MARCUS	1966	1701 FEDERATION WAY	STE 10F	ENTERPRISE
				1701 FEDERATION WAY	STE 10F	ENTERPRISE

Timeout: 19:26

Data Classification: 3

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Figure 3-20: Client Search by address

- 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).

OPUS Weatherization Agency: OHCS HOME | Log Out
Client | Program | Historical | Management | Reports | Help
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Household View

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

HH Members Bold Red elements indicate poor data quality

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JAMES KIRK	49	M	DK	DK	N	RF	RF	Y	Y
<input type="checkbox"/>		CAROLE MARCUS	46	F	DK	N	RF	RF	RF	N	N
<input type="checkbox"/>		DR DAVID WILLIS MARCUS	23	M	PHD	N	Y	NH	S	Y	Y

New Client To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date
Address					
T	U	Address		Income Summary	
M		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828		JAMES KIRK	\$3,000.00
P		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828		DR DAVID WILLIS MARCUS	\$1,200.00
Household Summary					
Total Income				\$4,200.00	
% of Poverty				23%	
% of OMI				7%	
Total # of Persons				3	
HH Type				[Dropdown]	
Household Subsidized				<input type="checkbox"/>	

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Timeout: 19:21
Data Classification: 3

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HOME | Logout

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

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

- 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).

- 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).

OPUS Weatherization Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

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Household View

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

HH Members Bold Red elements indicate poor data quality

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JAMES KIRK	49	M	DK	DK	N	RF	RF	Y	Y
<input type="checkbox"/>		CAROLE MARCUS	46	F	DK	N	RF	RF	RF	N	N
<input type="checkbox"/>		DR DAVID WILLIS MARCUS	23	M	PHD	N	Y	NH	S	Y	Y

New Client To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date
Address					
T	U	Address	Income Summary		
M		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	JAMES KIRK		\$3,000.00
P		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	DR DAVID WILLIS MARCUS		\$1,200.00
					\$4,200.00
					23%
					7%
					3
					*

Phones

T	U	Number
H		(503) 999
C		(971) 000

Message from webpage

Are you sure you want to Move Entire Household to Unknown?

OK Cancel

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

HH Comments

2000 characters left (spaces count)

Timeout: 19:21

Data Classification: 3

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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 Weatherization Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

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Client Search New

Active

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

First Name: JEAN-LUC * DOB: 11-11-1911 (mm-dd-yyyy)*

Last Name: PICARD *

SSN/Sys#: SJEAN-L111112 *

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

Possible Matches

SSN #	First Name	Last Name	DOB
SJEANL111111	JEAN-LUC	PICARD	11-11-1911

Timeout: 18:03

[Data Classification: 3](#)

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HOME | Logout

Figure 3-23A: Client Search New

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

OPUS Weatherization Agency: OHCS HOME | Log Out
 Client | Program | Historical | Management | Reports | Help
 Version 2.11.0T

Client View Active

Select Another Client in HH JEAN-LUC PICARD Go

Client Information

Name JEAN-LUC PICARD **SSN/SYS ID#** SJEANL111111 **SSN DQC** DK

DOB 11-11-1911 **Age** 100

Phone 503-555-1212 **Type** HOME

Phone 503-999-9999 **Type** CELL

Phone 800-555-9422 **Type** CELL

Phone * **Ext** **Type** CELL

Mailing Address

UNKNOWN
 ENTERPRISE, OR 97828 **County** WALLOWA

Client Characteristics

Gender MALE **Language** OTHER **Education** PS, MASTERS DEGREE
Veteran YES **Disability** YES **Homebound** NO
Ethnicity NON-HISPANIC/NON-LATINO **Race** White **Oregon Tribe**

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Income/Employer (Setting to No, No - Zero Income, Don't Know or Refused will delete all income)

Does this client have any income? YES

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

Timeout: 19:54
[Data Classification: 3](#)

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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*).

Agency: OHCS

HOME | Log Out

Client | Program | Historical | Management | Reports | Help

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Move Client

Active

To Move:
Enter into search fields for client(s) to move to a different household.
From the results below - Make selections under the **M** column, on left and right sides, then click button at end of page, to "Move Client(s) to Household".

NOTE: One or more clients can be moved, but only **ONE** household can be selected to move client(s) into.

Client(s) FROM - Enter at least one		TO Household - Enter at least one	
SSN1	<input type="text" value="SJEANL111111"/>	SSN	<input type="text" value="SJAMES033063"/>
SSN2	<input type="text"/>	First	<input type="text" value="JAMES"/>
SSN3	<input type="text"/>	Last	<input type="text" value="KIRK"/>
First	<input type="text" value="JEAN-LUC"/>		
Last	<input type="text" value="PICARD"/>		

Timeout: 18:50

[Data Classification: 3](#)

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Figure 3-24A: Move Client

- 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*).

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 Client | Program | Historical | Management | Reports | Help
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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](#)

Move Client

To Move:
 Enter into search fields for client(s) to move to a different household.
 From the results below - Make selections under the **M** column, on left and right sides, then click button at end of page, to "Move Client(s) to Household".

NOTE: One or more clients can be moved, but only **ONE** household can be selected to move client(s) into.

Client(s) FROM - Enter at least one				TO Household - Enter at least one		
SSN1	<input type="text" value="SJEANL111111"/>			SSN	<input type="text" value="SJAMES033063"/>	
SSN2	<input type="text"/>			First	<input type="text" value="JAMES"/>	
SSN3	<input type="text"/>			Last	<input type="text" value="KIRK"/>	
First	<input type="text" value="JEAN-LUC"/>					
Last	<input type="text" value="PICARD"/>					

Select M column to move (select one or more)				Select M column to move (select only one more)			
M	SSN	First	Last	M	SSN	First	Last
<input checked="" type="checkbox"/>	SJEANL111111	JEAN-LUC	PICARD	<input checked="" type="radio"/>	SJAMES033063	JAMES	KIRK

(Household View Screen will appear next)

Timeout: 18:58
[Data Classification: 3](#)

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 HOME | Logout

Figure 3-24B: Move Client

- 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*).

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Client | Program | Historical | Management | Reports | Help

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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](#)

Move Client

To Move:
 Enter into search fields for client(s) to move to a different household.
 From the results below - Make selections under the **M** column, on left and right sides, then click button at end of page, to "Move Client(s) to Household".

NOTE: One or more clients can be moved, but only **ONE** household can be selected to move client(s) into.

Client(s) **FROM** - Enter at least one

TO Household - Enter at least one

SSN1 SSN
 SSN2 First
 SSN3
 First
 Last

Select **M** column to move (select only one more)

M	SSN	First	Last
<input checked="" type="checkbox"/>	SJEANL111111	JEAN-LUC	PICARD
<input type="checkbox"/>	SJAMES033063	JAMES	KIRK


(Household View Screen will appear next)

Timeout: 18:24
[Data Classification: 3](#)

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Figure 3-24C: Client Move - Verification



OPUS

Weatherization

Agency: OHCS

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Client | Program | Historical | Management | Reports | Help

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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](#)

Household View

Active

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

HH Members Bold Red elements indicate poor data quality

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JEAN-LUC PICARD	100	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>		JAMES KIRK	49	M	DK	DK	N	RF	RF	Y	Y
<input type="checkbox"/>		CAROLE MARCUS	46	F	DK	N	RF	RF	RF	N	N
<input type="checkbox"/>		DR DAVID WILLIS MARCUS	23	M	PHD	N	Y	NH	S	Y	Y

To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TESTJOB3	BOTH	PENDING	\$3,850.00	07-23-2020
CCN	TESTJOB4	WX ONLY	COMPLETED	\$1,000.00	11-11-2012

Address

T	U	Address
M		ADDRESS UNKNOWN ENTERPRISE, OR 97828
M		UNKNOWN ENTERPRISE, OR 97828
P		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Phones

T	U	Number	Client Name
C		(800) 555-9422	CAROLE MARCUS
C		(800) 555-9422	JAMES KIRK
H		(503) 999-8422	JAMES KIRK
C		(800) 555-9422	JEAN-LUC PICARD
C		(503) 999-9999	JEAN-LUC PICARD
H		(503) 555-1212	JEAN-LUC PICARD
C		(800) 555-9422	DR DAVID WILLIS MARCUS
C		(971) 000-1111	DR DAVID WILLIS MARCUS

Income Summary

JAMES KIRK	\$3,000.00
DR DAVID WILLIS MARCUS	\$1,200.00

Household Summary

Total Income	\$4,200.00
% of Poverty	18%
% of OMI	6%
Total # of Persons	4
HH Type	2-Parent <input type="text"/>
Household Subsidized	<input type="checkbox"/>

Make any changes?

HH Comments

2000 characters left (spaces count)

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

Timeout:
18:39

[Data Classification: 3](#)

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Figure 3-24D: Household View - Move Completed

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WEATHERIZATION OPUS User Manual, Section 3 – Existing Clients

[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*).

OPUS Weatherization Agency: OHCS HOME | Log Out

Client | Program | Historical | Management | Reports | Help

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Client Search

(Type "Apt, Unit" etc. with #)

SSN/SYSID Address #

First Name City

Last Name Zip Show Residence Info. only

Show Residences With Jobs only

When you Click in Search Results:
Client's SSN/SYS# = Household Screen
Client's Name = Client Screen
Residence Address = Residence Screen
A maximum of 100 results will be returned. [Advanced Search](#)

SSN #	First Name	Last Name	Birth Year	Address	Unit	City
SJEAN111111	JEAN-LUC	PICARD	1911			

Timeout: 19:58
Data Classification: 3

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Figure 3-25: Move existing client search

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Household View

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

HH Members Bold Red elements indicate poor data quality

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JEAN-LUC PICARD	100	M	MA	Y	Y	NH	S	Y	Y

To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date
Address					
T U	Address				Household Summary
M	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828				Total Income \$0.00
					% of Poverty 0%
					% of OMI 0%
					Total # of Persons 1
Phones					
T U	Number	Client Name			
H	(503) 555-1212	JEAN-LUC PICARD			
HH Type <input type="text" value=""/>					
Household Subsidized <input type="checkbox"/>					
<input type="button" value="Make any changes?"/> <input type="button" value="Save Changes"/>					
HH Comments					
<input type="text"/>					
2000 characters left (spaces count)					

To Remove Household: Click this button

Timeout: 14:16
Data Classification: 3

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

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Residence
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Household
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[Mail/Ph Update](#)
[NCB Update](#)

Move
[Client to HH](#)
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[Merge HH](#)

Move Household to Residence

Active

To Move Household
 Enter in search fields for an existing household to move to an existing residence. Choose HH and Residence in results, then click button at end of this page, to "Move Household to Residence".

NOTE: Only ONE household can be move to ONE residence.

FROM Household		TO Residence	
SSN	<input type="text"/> e.g. 000-00-0000	Address	<input type="text"/> 1701 FEDERATION WA # <input type="text"/> STE 10F
First	<input type="text"/> JEAN-LUC e.g. John	City	<input type="text"/> ENTERPRISE
Last	<input type="text"/> PICARD e.g. Smith	Zip	<input type="text"/> 97828

Timeout: 18:32
Data Classification: 3

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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?'

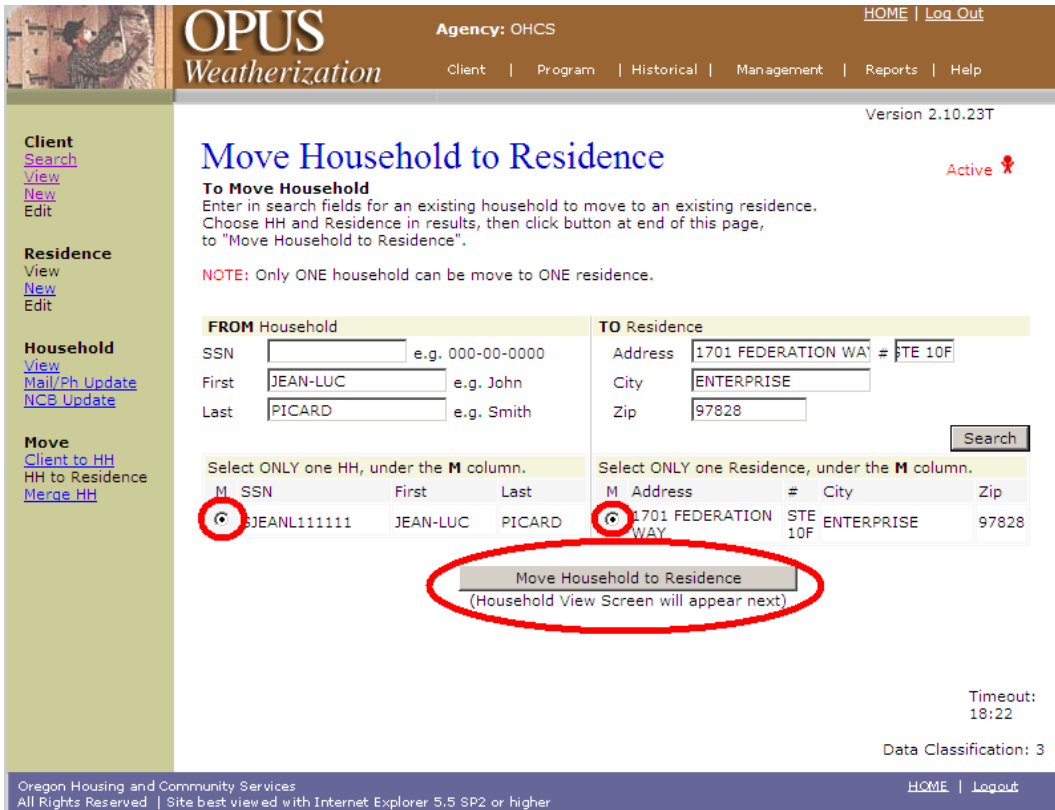


Figure 3-26: Move Household to Residence

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

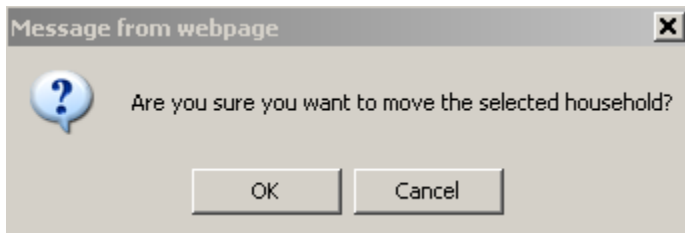


Figure 3-26A: Confirmation to move to HH to Residence

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

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Household View

Active

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

HH Members Bold Red elements indicate poor data quality

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JEAN-LUC PICARD	100	M	MA	Y	Y	NH	S	Y	Y

To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date
Address					
T U Address			Household Summary		
M	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828			Total Income	\$0.00
				% of Poverty	0%
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828			% of OMI	0%
				Total # of Persons	1
Phones				HH Type	Single <input type="button" value="v"/>
T U Number		Client Name		Household Subsidized	<input type="checkbox"/>
H	(503) 555-1212	JEAN-LUC PICARD		<input type="button" value="Make any changes?"/> <input type="button" value="Save Changes"/>	

HH Comments

2000 characters left (spaces count)

To Remove Household: Click this button

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Timeout: 16:23

Data Classification: 3

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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).

The screenshot displays the OPUS Weatherization web application interface. The top navigation bar includes the agency name 'OHCS' and links for 'HOME' and 'Log Out'. The main content area is titled 'Household Mail and Phone Update' and features a form for updating mailing information. The form includes fields for 'No.', 'Direction', 'Street Name', 'Type', 'Direction', 'Unit', '#', 'City', 'ST', 'Zip', and 'County'. A table below the form lists phone numbers and types for 'JEAN-LUC PICARD'. A confirmation dialog box is open, asking 'Are you sure you want to update Mailing address for the entire Household?' with 'OK' and 'Cancel' buttons. The left navigation bar contains links for 'Client', 'Residence', and 'Household', with the 'Household' link circled in red and labeled '#1'. The 'Update Mailing Address' button is circled in red and labeled '#2'. The 'OK' button in the dialog is circled in red and labeled '#3'.

No.	Direction	Street Name	Type	Direction	Unit	#
1701		FEDERATION	WAY		STE	10F

City	ST	Zip	County
ENTERPRISE-97828	OR	97828-ENTERPRISE	WALLOWA

Phone:	Type:	Edit	Delete
503-555-1212	HOME		
* Ext: *	CELL	Add	Add HH

Figure 3-27: 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*).

The screenshot displays the 'Household View' for a client named JEAN-LUC PICARD. The interface includes a left navigation bar with a red circle around the 'Merge HH' link. The main content area shows the following data:

Client Information: JEAN-LUC PICARD, Age 100, Gen M, Educ MA, Vet Y, Disb Y, Ethn NH, Race S, NCB Y, Income Y.

Address: 1701 FEDERATION WAY STE 10F, ENTERPRISE, OR 97828.

Household Summary: Total Income \$0.00, % of Poverty 0%, % of OMI 0%, Total # of Persons 1.

Phones: (503) 555-1212, Client Name JEAN-LUC PICARD.

HH Comments: 2000 characters left (spaces count).

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Figure 3-28: HH View after merge.

2. #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.

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Merge Households

To Merge:
 Enter into fields to search Households to merge. From search Results, choose HHs on left and right then click button, at end of page, "Move Client(s)"

Enter HH to **Move FROM**

SSN:
 First: JAMES
 Last: KIRK

AND

Enter HH to **Merge TO**

SSN:
 First: JEAN-LUC
 Last: PICARD

#1

#2

FROM (select only one)

M	SSN	First	Last
<input type="radio"/>		JAMES	KIRK
<input type="radio"/>		JAMES	KIRK
<input checked="" type="radio"/>	SJAMES033063	JAMES	KIRK
<input type="radio"/>		JAMES	KIRK

TO (select only one)

M	SSN	First	Last
<input checked="" type="radio"/>	SJEANL111111	JEAN-LUC	PICARD

#3
 (Household View Screen will appear next)

Message from webpage: Are you sure you want to merge the selected households?
 #4

Timeout: 19:26
 Data Classification: 3

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Figure 3-28A: HH View processing merge.

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



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Household View Active

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

HH Members Bold Red elements indicate poor data quality

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JEAN-LUC PICARD	100	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>		JAMES KIRK	49	M	DK	DK	N	RF	RF	Y	Y
<input type="checkbox"/>		CAROLE MARCUS	46	F	DK	N	RF	RF	RF	N	N
<input type="checkbox"/>		DR DAVID WILLIS MARCUS	23	M	PHD	N	Y	NH	S	Y	Y

New Client To remove a client: Choose from R column, scroll down to click button.

Jobs

Agency	Number	Type	Status	Cost	Completion Date
Address					
T	U	Address	Income Summary		
M		ADDRESS UNKNOWN ENTERPRISE, OR 97828	JAMES KIRK		\$3,000.00
M		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	DR DAVID WILLIS MARCUS		\$1,200.00
Household Summary					
P		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	Total Income		\$4,200.00
			% of Poverty		19%
			% of OMI		6%
			Total # of Persons		4
			HH Type		<input type="text" value=""/>
			Household Subsidized		<input type="checkbox"/>

Phones

T	U	Number	Client Name
H		(503) 999-8422	JAMES KIRK
H		(503) 555-1212	JEAN-LUC PICARD
C		(971) 000-1111	DR DAVID WILLIS MARCUS

Make any changes?

HH Comments

2000 characters left (spaces count)

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

Timeout: 17:30
 Data Classification: 3

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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).

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Household Mail and Phone Update

Active  

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

#1 [Mail/Ph Update](#)

#2 # Type Direction Unit #

ADDRESS UNKNOWN - ENTERPRISE OR, 97828
ADDRESS UNKNOWN - ENTERPRISE OR, 97828
ADDRESS UNKNOWN - ENTERPRISE OR, 97828
ADDRESS UNKNOWN - ENTERPRISE OR, 97828
ADDRESS UNKNOWN - ENTERPRISE OR, 97828

#3 County

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

JAMES KIRK

Phone: Type: HOME

Phone: * Ext: Type: CELL *

DR DAVID WILLIS MARCUS

Phone: Type: CELL

Phone: * Ext: Type: CELL *

CAROLE MARCUS

Phone: * Ext: Type: CELL *

JEAN-LUC PICARD

Phone: Type: HOME

Phone: * Ext: Type: CELL *

Message from webpage

Are you sure you want to update Mailing address for the entire Household?

#4

Timeout: 11:51
Data Classification: 3

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Figure 3-29: Update Household Mailing