

## 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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Energy Education	See Section 4
Kit Components	See Section 4

*All SSNs throughout this manual have be 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 Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:46  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client Search

Search Parameters (at least one field required)

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

First Name:  City:

Last Name:  Zip:  ☐ Show Residence Info. only

When you Click in Search Results:  [Advanced Search](#)

[Client's SSN](#) = Household Screen  
[Client's Name](#) = Client Screen  
[Residence Address](#) = Residence Screen  
A maximum of 100 results will be returned.

**Data Classification: 3**

Oregon Housing and Community Services ©

Figure 3-1: Client Search Screen

When the search is successful, the client's information will show in the 'Search Results' section (reference figure 3-2). Repeat a search for each client in household. In the 'Search Results', SSN# (Client's System ID), first name, last name, Birth Year, address, unit and city will display.

The screenshot displays the OPUS Energy Assistance web interface. At the top, the header includes the OPUS logo, agency name 'OHCS', user 'TESTUSER', and a timeout of 18:39. A navigation bar contains links for Client, Program, Fiscal, Management, Reports, and Help. The left sidebar lists various actions like Client Search, View, New, Edit, and Household management. The main content area is titled 'Client Search' and features a search form with fields for SSN/SYSID, Address, Unit, First Name, City, and Last Name. The search results table shows one entry for 'KOR SON-OF-RYNAR' with birth year 1912 and address 1701 VORCHA AVE, SPC 3, ENTERPRISE. A red note at the bottom states: 'The link has been left in for an example SYSID# which is not real.'

**Client Search**

Search Parameters (at least one field required)

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

First Name:  City:

Last Name:  Zip:  ☐ Show Residence Info. only

When you Click in Search Results:  [Advanced Search](#)

[Client's SSN](#) = Household Screen  
[Client's Name](#) = Client Screen  
[Residence Address](#) = Residence Screen  
A maximum of 100 results will be returned.

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
SKOR092112	KOR	SON-OF-RYNAR	1912	1701 VORCHA AVE	SPC 3	ENTERPRISE

The link has been left in for an example SYSID# which is not real.

Data Classification: 3

Oregon Housing and Community Services ©

**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. Kor Son-of-Rynar 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 city to view the 'Residence View' screen.


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

Following a client search, to view a client's 'Household View' screen by clicking the client's social security number or system ID number is recommended. 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 Son-of-Rynar's SSN/SYSID to bring up the HH view.



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

User: TESTUSER  
Timeout: 19:53  
Log Out



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

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

Household View

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

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

New Client

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

To Remove Household: Click this button

Remove Client(s) from Household

Move Entire Household to Unknown

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

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

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

Client Vendor (Vendors in red are expired)

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

New Vendor

Address

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

Phones

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

Income Summary

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

Household Summary

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

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Data Classification: 3

**Figure 3-3:** HH view screen

The ‘Household View’ screen will appear (*reference figure 3-3*). On Son-of-Rynar’s HH View screen, it displays the following:

1. Son-of-Rynar’s household includes other members.
2. The Son-of-Rynar’s 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**  
Energy Assistance

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

User: TESTUSER  
Timeout: 19:58  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client**  
Search  
View  
New  
Edit

**Residence**  
View  
New  
Edit

**Household**  
View  
Mail/Ph Update  
NCB Update

**Move**  
Client to HH  
HH to Residence  
Merge HH

**Energy Education**  
View  
Kit Component New

## Residence View

**Physical Address**  
1701 VORCHA AVE SPC 3  
ENTERPRISE, OR 97828

**Residence Info**  
Status: Rent (Heat not) Type: MFD/Mobile  
County: WALLOWA

**Energy Sources**

Y	Electric	N	Wood	Primary Source: ELECTRIC
N	Natural Gas	N	Pellet	
N	Oil	N	Solar	
N	Liquid Gas	N	Other	

Edit Residence

Data Classification: 2

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**Figure 3-4:** Residence View and Edit

3. The HH includes a second person who meets the definition of a HH member. If a new application was to include a third 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](mailto: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*).

**OPUS Energy Assistance**

Agency: OHCS User: TESTUSER Timeout: 19:45

Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client Search

Search Parameters (at least one field required)

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

First Name: City: ENTERPRISE

Last Name: Zip: ☐ Show Residence Info. only

When you Click in Search Results: **Search** Advanced Search

Client's SSN = Household Screen

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Data Classification: 3

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**Figure 3-5: Client Search – Residence Search**

- When a residence is found in the database, the address and city will be displayed in the ‘Search Results’ (*reference figure 3-6*). If this residence isn’t correct, update the residence information in the following order:
  - Create a New Residence
  - Move a Household to New Residence

**OPUS Energy Assistance**

Agency: OHCS User: TESTUSER Timeout: 19:57

Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client Search

Search Parameters (at least one field required)

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

First Name: City: ENTERPRISE

Last Name: Zip: ☐ Show Residence Info. only

When you Click in Search Results: **Search** Advanced Search

Client's SSN = Household Screen

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

SSN #	First Name	Last Name	Birth Year	Address	Unit	City
				666 PAGH DR	APT 1	ENTERPRISE

Data Classification: 3

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**Figure 3-6: Client Search – Residence Search with 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**  
Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 17:31  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client Search**

Search Parameters (at least one field required)

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

First Name:  City:

Last Name:  Zip:  ☐ Show Residence Info. only

When you Click in Search Results: **Search**

Client's SSN = Household Screen [Advanced Search](#)

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

**Search Results**

No Results Found

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

[Data Classification: 3](#)

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**Figure 3-7:** Client Search for 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**  
Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:54  
Log Out

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

Version 3.0.4T

**Client**  
Search  
View  
New  
Edit

**Residence**  
View  
New  
Edit

**Household**  
View  
Mail/Ph Update  
NCB Update

**Move**  
Client to HH  
HH to Residence  
Merge HH

**Energy Education**  
View  
Kit Component New

## Residence New

**Physical Address**

PO Box is not a valid residence address.  
"HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g.,  
Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¼ miles past mile post marker 35 on Hwy 166.

No.  Direction  Street Name  Type  Direction  Unit  #

City  St.  Zip Code  +4  County

**Residence Info**

Residence Type  \* Residence Status  \*

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

☐ Electric ☐ Wood ☐ Natural Gas ☐ Pellet ☐ Oil ☐ Solar ☐ Liquid Gas ☐ Other

Primary Source  \*

**Save**

**Data Classification: 2**

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**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 updating or revision, the 'Edit' link or button is available to update or correct information. Most "View Screens" are for viewing purposes, the *exceptions* are the 'Household View' and 'Client View' screens.

## Residence Edit

### Setup:

On the 'Client View' screen.

1. On the 'Left Nav Bar', click the 'Residence View' link (*reference figure 3-9*) and the 'Residence View' screen will appear next. On the Left Nav bar under 'Residence', click the 'Edit' link or the 'Edit Residence' button (*reference figure 3-9A*). The 'Residence Edit' screen will open. Do not edit the physical address unless the building has physically moved to a new location or the physical address contains typos. 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 (*reference figure 3-10*). Everything else stays the same as detailed on the client's application.

**NOTE:** Changes to residential address are logged and substantial changes will trigger an audit review.

**OPUS Energy Assistance**

Agency: OHCS  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:40  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client View**

Client Search View New Edit

**Residence**  
View New Edit

**Household**  
View Mail/Ph Update NCB Update

**Move**  
Client to HH HH to Residence Merge HH

**Energy Education**  
View Kit Component New

**Residence View**

**Physical Address**  
666 PAGH DR APT 1  
ENTERPRISE, OR 97828

**Residence Info**  
Status: Rent (Heat not) Type: Multi-Unit ( 2-4 )  
County: WALLOWA

**Energy Sources**

Y	Electric	N	Wood	Primary Source: ELECTRIC
Y	Natural Gas	N	Pellet	
N	Oil	N	Solar	
N	Liquid Gas	N	Other	

**Edit Residence**

Data Classification: 2

Oregon Housing and Community Services ©

Figure 3-9: in the Client View

Figure 3-9A: Residence View, Edit Link and Button

**OPUS Energy Assistance**

Agency: OHCS  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:51  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Residence Edit**

**Physical Address**

Do not edit the 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 Residence Address.

PO Box is not a valid residence address.  
"HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¾ miles past mile post marker 35 on Hwy 166.

No. 666 Direction DR Street Name PAGH Type DR Direction Unit APT # 1

City ENTERPRISE-97828 St. OR Zip Code 97828-ENTERPRISE +4 County WALLOWA

**Residence Info**

Residence Type Multi-Unit ( 2-4 ) \* Residence Status Rent (Heat not) \*

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

Primary Source ELECTRIC \*

☒ Electric ☐ Wood  
☒ Natural Gas ☐ Pellet  
☐ Oil ☐ Solar  
☐ Liquid Gas ☐ Other

**Save**

Data Classification: 2

Oregon Housing and Community Services ©

Figure 3-10: 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**.

### 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 Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:43  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client Search

Search Parameters (at least one field required)

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

First Name:  City:

Last Name:  Zip:  ☐ Show Residence Info. only

When you Click in Search Results:

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

[Client's Name](#) = Client Screen

[Residence Address](#) = Residence Screen

A maximum of 100 results will be returned.

[Advanced Search](#)

[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

Energy Education View Kit Component New

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-11: Client Search Screen

2. In the results, click the client's SSN number link to access 'Household View' screen (reference figure 3-12).

Agency: OHCS

User: TESTUSER  
Timeout: 19:54  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Client Search

Search Parameters (at least one field required)

SSN/SYSID: Address: Unit: (ie Apt B)  
First Name: KOR City:  
Last Name: SON-OF-RYNAR Zip: ☐ Show Residence Info. only

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

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
SKOR092112	KOR	SON-OF-RYNAR	1912	1701 VORCHA AVE	SPC 3	ENTERPRISE

The link has been left in for an example SYSID# which is not real.

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-12: Client Search Screen with results**

- Under the 'HH Members' section, click the 'New Client' button (reference figure 3-13). The 'Client Search New' screen will appear next.

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

User: TESTUSER  
Timeout: 19:57  
Log Out

Oregon  
Housing and Community Services

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Household View

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

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

**New Client**

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

To Remove Household: Click this button

Remove Client(s) from Household

Move Entire Household to Unknown

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

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

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

Client Vendor (Vendors in red are expired)

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

New Vendor

Income Summary

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

Household Summary

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

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-13: HH view, New Client button

**OPUS**  
Energy Assistance

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

User: TESTUSER  
Timeout: 19:48  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client Search New**

**Current Household Members**

SSN/SYSID	Name	Gender	Age
████████	KOR SON-OF-RYNAR	M	101
████████	KANG SON-OF-AROK	M	99

**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 Pre-Existing Client Matches**

SSN #	First Name	Last Name	DOB
No Results Found			

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-14: Client Search New Screen - 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 if necessary.
- Legal first name, middle name, last name. \*
- Review social security number or system identification number for accuracy.
- SSN Verification. \*  
This is to describe if the SSN is full or ‘don’t know/don’t have’ or ‘refuse’ for system identification.
- Client ‘Comments’ Box
- One phone number, extension, and type.
- Mailing Address: \*  
The first client created for a household, type their mailing address in provided boxes. For subsequent clients, the select from drop-down menu will display previous mailing addresses.
  - Street number, Street direction: S, N, NE, NW, etc.
  - Street name.
  - Street type: Ave, Lane, etc.
  - Unit type: Apt, Unit, PO Box, etc.
  - Enter an apt number or PO Box number.
  - City or Zip Code
- Gender \*

- Disabled \*
- Ethnicity \*
- Veteran \*
- Education.
- Language.
- Homebound
- Transportation (if Homebound set to 'YES')
- Race.\*
- Oregon Tribe Option (if Native American has been selected)
- Non-Cash benefits client receives \*
- Does this client have any income \*  
(None, Yes, None-Zero Income Statement, Don't Know, Refused).  
If 'None-Zero Income Statement' is selected a required 'Zero Income Comment' block appears; otherwise it is hidden.
- Click the 'Save' Button to save the client information (*reference figure 3-15*).

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



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

User: TESTUSER  
Timeout: 18:16  
Log Out

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

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Client New

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

Title

First Name KOLOTH \*

Middle

Last Name SON-OF-DAMAR \*

Suffix

DOB 05-24-1930 (mm-dd-yyyy) \*

SSN/Sys# SKOLOTH052430 \*

Create ID

Adult Id Verified? ☒

SSN Verification YES \*

Comments

2000 characters left (spaces count)

Phone

Primary Phone WORK - (503) 988-8888 OR enter new number below.

Primary Phone 503-555-1212 EXT HOME Type

Mailing Address \*

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

999 PAGH ST - ENTERPRISE OR, 97828

"HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¼ miles past mile post marker 35 on Hwy 166.

No. Direction Street Name Type Direction Unit #

City ST Zip Code +4 County

Client Characteristics

Gender: MALE \*

Disabled: YES \*

Ethnicity: NON-HISPANIC/NON-LATINO \*

Veteran: YES \*

Education: PS, MASTERS DEGREE

Language: ENGLISH

Homebound: YES

Transport: YES

Race (Check all that apply) \*

☐ African American

☐ American Indian/Alaska Native

☐ Asian

☐ Native Hawaiian or Pacific Islander

☒ White

☐ Don't Know

☐ Refused

Oregon Tribes

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

☐ SNAP

☒ Oregon Health Plan

☒ MEDICARE

☐ WIC

☒ VA Med Serv

☐ TANF Child Care

☐ TANF Trans

☐ Other TANF

☐ Public Rental Assist

☐ Other Health Ins

☐ Other Source

☐ Temp Rental Assist

☐ None

☐ Don't Know

☐ Refused

Income

Does this client have any income? YES \*

Save

Data Classification: 3

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Figure 3-15: Client New Screen

Click the 'Save' button.

Agency: OHCS  
Client: KOLOTH SON-OF-DAMAR  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:23  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Client View  
New  
Edit

Residence View  
New  
Edit

Household View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education View  
Kit Component New

### Client View

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

**Client Information**

Name: KOLOTH SON-OF-DAMAR SSN/SYS ID#   
DOB: 05-24-1930 Age: 83  
SSN Verification: YES Adult ID Verified? YES  
Comments:   
Phone: 503-988-8888 Type: WORK Edit Delete  
Phone:  \* Ext:  Type: CELL \* Add

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

**Client Characteristics**  
Gender: MALE Disability: YES  
Ethnicity: NON-HISPANIC/NON-LATINO Veteran: YES  
Education: PS, MASTERS DEGREE Language: ENGLISH  
Homebound: YES Race: SINGLE  
Transportation: YES Oregon Tribe:  
Edit Client View Household

**Non-Cash Benefits**

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

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

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

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

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


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

Data Classification: 3

Oregon Housing and Community Services ©


**Figure 3-16: Client View Screen – Select Another Client in HH Dropdown**

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 3-16*). The figure below shows in detail the HH selection (*reference figure 3-16A*).



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

**User:** TESTUSER  
**Timeout:** 19:50  
[Log Out](#)



**Client**  
[Search](#)  
[View](#)  
[New](#)  
[Edit](#)

**Residence**  
[View](#)  
[New](#)  
[Edit](#)

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

## Client View

Select Another Client in HH

KOR SON-OF-RYNAR

KOR SON-OF-RYNAR

KANG SON-OF-AROK

KOLOTH SON-OF-DAMAR

Go

**Client Information**

**Name:** KOR SON-OF-RYNAR
 **SSN/SYS ID#** ██████████

**DOB:** 09-21-1912
 **Age:** 101

Version 3.0.4T

**Figure 3-16A:** HH member view selection

## Client Edit

### Setup:

On the 'Client View' screen, working with the dropdown box 'Select Another Client in HH' (reference figure 3-16A). Once the correct name is selected, click the 'Go' button.

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:54  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client Edit

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

Title: [Dropdown]  
First Name: KOR  
Last Name: SON-OF-RYNAR  
DOB: 09-21-1912 (mm-dd-yyyy)  
SSN/Sys#: SKOR092112  
Adult Id Verified? [X]  
SSN Verification: YES  
Comments: [Text Area]  
2000 characters left (spaces count)

**Mailing Address\***

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

[Edit Current Mailing Address]

"HOMELESS" is not a valid address; If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¼ miles past mile post marker 35 on Hwy 156.

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

City: ENTERPRISE-97828 OR 97828-ENTERPRISE  
ST: [Dropdown]  
Zip Code: [Dropdown]  
County: WALLOWA

**Client Characteristics**

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

**Race (Check all that apply)\***

☐ African American  
☐ American Indian/Alaska Native  
☐ Asian  
☐ Native Hawaiian or Pacific Islander  
☐ White  
☐ Don't Know  
☒ Refused  
Oregon Tribes: [Dropdown]

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

☐ SNAP  
☐ WIC  
☐ TANF Trans  
☒ Other Health Ins  
☐ Oregon Health Plan  
☒ VA Med Serv  
☐ Other TANF  
☐ Other Source  
☒ MEDICARE  
☐ TANF Child Care  
☐ Public Rental Assist  
☐ Temp Rental Assist  
☐ None  
☐ Don't Know  
☐ Refused

Save Changes

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-17: Client View Screen to Edit Client Information

1. 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 3-17). The 'Client Edit' screen will appear next (reference figure 3-18).

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

User: TESTUSER  
Timeout: 19:49  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Client Edit
Residence View New Edit
Household View Mail/Ph Update NCB Update
Move Client to HH HH to Residence Merge HH
Energy Education View Kit Component New

### Client Edit

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

Title
First Name: KOR
Last Name: SON-OF-RYNAR
DOB: 09-21-1912

Middle
Suffix
SSN/Sys#: SKOR092112

Adult Id Verified?
SSN Verification: YES

Comments

2000 characters left (spaces count)

#### Mailing Address\*

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

Edit Current Mailing Address

\*HOMELESS\* is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¼ miles past mile post marker 35 on Hwy 166.

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

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

#### Client Characteristics

Gender: MALE
Ethnicity: REFUSED
Education: POST SECONDARY, NO DEGREE
Homebound:

Disabled: NO
Veteran: YES
Language: MAYAN GROUP
Transport: NO

#### Race (Check all that apply)\*

☐ African American
☐ American Indian/Alaska Native
☐ Asian
☐ Native Hawaiian or Pacific Islander
☐ White

☐ Don't Know
☒ Refused

Oregon Tribes

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

☐ SNAP
☐ WIC
☐ TANF Trans
☒ Other Health Ins

☐ Oregon Health Plan
☒ VA Med Serv
☐ Other TANF
☐ Other Source

☒ MEDICARE
☐ TANF Child Care
☐ Public Rental Assist
☐ Temp Rental Assist

☐ None
☐ Don't Know
☐ Refused

Save Changes

Data Classification: 3

Figure 3-18: 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 3-18).

When the information has been verified and correct, click the 'Save Changes' button at the bottom of the screen (reference figure 3-19). The 'Client View' screen will appear with the most current changes.

Agency: OHCS

Client: KOR SON-OF-RYNAR 6466631/1623245

Residence: ENTERPRISE, OR 97828

User: TESTUSER

Timeout: 19:54

[Log Out](#)

[Client](#)
[Program](#)
[Fiscal](#)
[Management](#)
[Reports](#)
[Help](#)

Version 3.0.4T

Client  
[Search](#)  
[View](#)  
[New](#)  
[Edit](#)

## Client Edit

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

Title

First Name

Last Name

DOB

Middle

Oregon

Create

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

☐ SNAP  
☐ WIC  
☐ TANF Trans  
☒ Other Health Ins

☐ Oregon Health Plan  
☒ VA Med Serv  
☐ Other TANF  
☐ Other Source

☒ MEDICARE  
☐ TANF Child Care  
☐ Public Rental Assist  
☐ Temp Rental Assist

☐ None  
☐ Don't Know  
☐ Refused

[Save Changes](#)

Data Classification: 3

Figure 3-19: Client Edit ‘Save Changes’

## Household Non-Cash Benefits Update

### Setup:

On the 'Household View' Screen.

1. Click the 'NCB Update' link on the 'Left Nav Bar' under Household reference (reference figure 3-20).

**Note:** You must have either a household and or client in active memory (reference figure 2-18).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:33  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Household View

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

**HH Members**

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>	[REDACTED]	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	N	Y
<input type="checkbox"/>	[REDACTED]	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

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

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

**New Vendor**

**Income Summary**

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

**Household Summary**

Total Income	\$4,200.00
% of Poverty	22%
% of OMI	7%
Total # of Persons	3
HH Type	Co-Habitants
Household Subsidized	<input type="checkbox"/>

Make any changes? **Save Changes**

**HH Comments**

2000 characters left (spaces count)

**Data Classification: 3**

Oregon Housing and Community Services ©

Figure 3-20: 'Household View' Screen

2. The ‘Household Non-Cash Benefits Update’ screen will appear. From this screen you can update non-cash benefits by individual or by entire household.

- A. To make changes to a single individual select or deselect the NCB’s that the client is currently receiving and select ‘Save Changed’ button for the client you are updating. (reference figure 3-21).
- B. To make changes to the entire household choose a member of the household select or deselect non-cash benefits household is receiving and select ‘Apply to Household’ button (reference figure 3-21). **Warning: This will override any previously entered NCB’s for individuals.** (reference figure 3-22)

The screenshot displays the 'Household Non-Cash Benefits Update' interface. At the top, it shows the agency (OHCS), client (KOR SON-OF-RYNAR), and residence (ENTERPRISE, OR 97828). The user is identified as TESTUSER with a timeout of 18:59. The interface includes a navigation menu on the left with options like Client, Residence, Household, Move, and Energy Education. The main content area lists three clients, each with a set of non-cash benefits to be updated. For each client, there are checkboxes for various programs (SNAP, WIC, TANF, Medicare, etc.) and radio buttons for 'None', 'Don't Know', and 'Refused'. The 'Save Changes' and 'Apply to Household' buttons are highlighted with red circles for each client entry. The 'Apply to Household' button is also highlighted with a red circle at the bottom of the screen.

Figure 3-21: ‘Household Non-Cash Benefits Update’ Screen

The next screen shows the results for the ‘Apply to Household’ button selection.



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

User: TESTUSER  
Timeout: 19:53  
Log Out

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

Version 3.0.4T

Client  
[Search](#)  
[View](#)  
[New](#)  
[Edit](#)

Residence  
[View](#)  
[New](#)  
[Edit](#)

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

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

Energy Education  
[View](#)  
[Kit Component New](#)

## Household Non-Cash Benefits Update

KOR SON-OF-RYNAR

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
Apply to Household

KOLOTH SON-OF-DAMAR

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
Apply to Household

KANG SON-OF-AROK

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
Apply to Household

Save All Changes

Data Classification: 2

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Figure 3-22: ‘Household Non-Cash Benefits Update’ Screen – After 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 3-23*).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:54  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client View

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

#### Client Information

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

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

#### Mailing Address

999 PAGH ST  
ENTERPRISE, OR 97828 County: WALLOWA

#### Client Characteristics

Gender: MALE Disability: NO  
Ethnicity: REFUSED Veteran: YES  
Education: POST SECONDARY, NO Language: MAYAN GROUP  
DEGREE  
Homebound: UNKNOWN Race: REFUSED  
Oregon Tribe:

[Edit Client] [View Household]

#### Non-Cash Benefits

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

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

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

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

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

Does this client have any income? YES [Save]

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-23: Client View Screen - Edit Income/Employer

- 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 3-24*). The 'Client View' screen will re-appear. **Note:** Fields marked with \* are required for an income source to be saved.

OPUS Energy Assistance

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

User: TESTUSER  
Timeout: 0:03  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Income & Employer Edit

Income (Fields marked with \* are required.)

Source: STATE OF OREGON  
Type: UNEMPLOYMENT \*  
Amount: 250 \* Frequency: Monthly \*  
Verified How: Check Pay Stub \* Verified By: TNU \* Verified Date: 11-01-2013 (mm-dd-yyyy) \*  
Income received in past 30 days? ☒ Don't use this record when creating Payments? ☐  
Comments  
2000 characters left (spaces count)

Employer Information

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

Delete Save

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-24:** Income & Employer Edit Screen

Click the 'Save' button when complete.

- 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 3-25, deleting income*).

**OPUS**  
Energy Assistance

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

User: TESTUSER  
Timeout: 19:22  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Income & Employer Edit**

Income (Fields marked with \* are required.)

Source: STATE OF OREGON  
Type: UNEMPLOYMENT  
Amount: 250 \* Frequency: Monthly \*  
Verified How: Check Pay Stub \* Verified By: TNU \* Verified Date: 09-28-2012 (mm-dd-yyyy) \*  
Income received in past 30 days? ☒ Don't use this record when creating Payments? ☐

Comments

2000 characters left (sp)

**Employer Information**

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

**Delete** **Save**

**Data Classification: 3**

Oregon Housing and Community Services ©

**Figure 3-25: Income & Employer Edit Screen - Delete/Confirmation**

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 3-24*).

## 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.

**NOTE: Absolutely never edit a residence address to move a household to a new address.**

### Setup:

1. On the 'Client Search' screen, enter Kor Son-of-Rynar's address and click the 'Search' button. The 'Search Results' indicates Kor Son-of-Rynar, Kang Son-of-Arok and Koloth Son-of-Damar affiliated with the address. Click on Kor's SSN to get to the 'Household View' screen (*reference figure 3-26*).

The screenshot shows the OPUS Energy Assistance interface. The top navigation bar includes the OPUS logo, Agency: OHCS, User: TESTUSER, Timeout: 19:49, and a Log Out button. Below the navigation bar are tabs for Client, Program, Fiscal, Management, Reports, and Help. The main content area is titled 'Client Search' and contains search parameters and results.

**Search Parameters (at least one field required)**

SSN/SYSID:	Address: 1701 VORCHA AVE	Unit: SPC 3 (ie Apt B)
First Name:	City: ENTERPRISE	
Last Name:	Zip:	<input type="checkbox"/> Show Residence Info. only

**When you Click in Search Results:**

- Client's SSN = Household Screen
- Client's Name = Client Screen
- Residence Address = Residence Screen

A maximum of 100 results will be returned.

**Search Results**

SSN #	First Name	Last Name	Birth Year	Address	Unit	City
SKOR092112	KOR	SON-OF-RYNAR	1912	1701 VORCHA AVE	SPC 3	ENTERPRISE
SKANG121213	KANG	SON-OF-AROK	1913	1701 VORCHA AVE	SPC 3	ENTERPRISE
SKOLOTH052430	KOLOTH	SON-OF-DAMAR	1930	1701 VORCHA AVE	SPC 3	ENTERPRISE
				1701 VORCHA AVE	SPC 3	ENTERPRISE

The link has been left in for an example SYSID# which is not real.

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-26: Client Search by address

- This HH needs to be moved from the existing address which is being occupied by Kor Son-of-Rynar. To move the family from the residence, click on 'Move Entire Household to Unknown' (reference figure 3-27).

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

User: TESTUSER  
Timeout: 19:57  
[Log Out](#)

[Client](#) [Program](#) [Fiscal](#) [Management](#) [Reports](#) [Help](#)

[Client Search](#)  
[View](#)  
[New](#)  
[Edit](#)

**Residence**  
[View](#)  
[New](#)  
[Edit](#)

**Household**  
[View](#)  
[Mail/Ph Update](#)  
[NCB Update](#)

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

**Energy Education**  
[View](#)  
[Kit Component New](#)

**Household View**

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

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>		KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y
<input type="checkbox"/>		KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y

**New Client**

To Remove a Client (one at a time):  
Select client under the R column above, then Click this button [Remove Client\(s\) from Household](#)

To Remove Household: Click this button [Move Entire Household to Unknown](#)

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

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

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

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

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

**New Vendor**

**Address**

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

**Phones**

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

**Income Summary**

KANG SON-OF-AROK	\$1,200.00
------------------	------------

**Household Summary**

Total Income	\$1,200.00
% of Poverty	6%
% of OMI	2%
Total # of Persons	3
HH Type	Co-Habitants *
Household Subsidized	<input type="checkbox"/>

Make any changes? [Save Changes](#)

**HH Comments**

2000 characters left (spaces count)

**Data Classification: 3**

Figure 3-27: HH View Screen. 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 3-27) and click on 'Remove Client(s) from Household' button (reference figure 3-27).
- 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 3-28).

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

User: TESTUSER  
Timeout: 19:57  
[Log Out](#)

[Client](#) [Program](#) [Fiscal](#) [Management](#) [Reports](#) [Help](#)

[View](#)  
[New](#)  
[Edit](#)

[View](#)  
[New](#)  
[Edit](#)

[View](#)  
[Mail/Ph Update](#)  
[NCB Update](#)

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

[View](#)  
[Kit Component New](#)

## Household View

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>		KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>		KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y	
<input type="checkbox"/>		KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y	

[New Client](#)

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

To Remove Household: Click this button

[Remove Client\(s\) from Household](#)

[Move Entire Household to Unknown](#)

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

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

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

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

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

Vendor	Type	Pri	Acct#	Name/Acct
PORTLAND GENERAL ELECTRIC				

[New Vendor](#)

#### Income Summary

Vendor	Amount
KANG SON-OF-AROK	\$1,200.00

### Address

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

### Phones

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

### HH Comments

2000 characters left (spaces count)

Total # of Persons: 3

HH Type: Co-Habitants

Household Subsidized: ☐

Make any changes? [Save Changes](#)

[OK](#) [Cancel](#)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-28: HH View Screen - Move HH to unknown confirmation.

## 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 3-29*). Click on the SSN# link for the corresponding client (*reference figure 3-29*).

**NOTE: Absolutely never edit a residence address to move a household to a new address.**

OPUS Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:41  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Client Search New

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

First Name: KURN \* DOB: 05-03-1965 (mm-dd-yyyy) \*  
Last Name: SON-OF-MOGH \*  
SSN/Sys#: SKURN050365 \*

Create ID

Search

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

#### Possible Pre-Existing Client Matches

SSN #	First Name	Last Name	DOB
SKURN061595	KURN	SON-OF-MOGH	06-15-1995

Add New Member

The link has been left in for an example SYSID# which is not real.

Data Classification: 3

Oregon Housing and Community Services

Figure 3-29: Client Search New Screen



- The 'Client View' Screen will appear. Click on the 'Client to HH' link on the left nav bar under 'Move' (reference figure 3-30).

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

User: TESTUSER  
Timeout: 19:57  
Log Out

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

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Client View

Select Another Client in HH

**Client Information**

Name: KURN SON-OF-MOGH SSN/SYS ID# XXXXXXXXXX  
DOB: 06-15-1995 Age: 18  
SSN Verification: YES Adult ID Verified? YES  
Comments:  
Phone: 503-000-9999 Type: HOME    
Phone:  \* Ext:  Type:  \*

**Mailing Address**

1701 E FEDERATION WAY  
ENTERPRISE, OR 97828 County: WALLOWA

**Client Characteristics**

Gender: MALE Disability: NO  
Ethnicity: NON-HISPANIC/NON-LATINO Veteran: YES  
Education: GED Language: RUSSIAN  
Homebound: UNKNOWN Race: SINGLE  
Oregon Tribe:

**Non-Cash Benefits**

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

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

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

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

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

Does this client have any income?

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-30: Client View Screen

- 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 3-31A*).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:02  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client**  
Search  
View  
New  
Edit

**Residence**  
View  
New  
Edit

**Household**  
View  
Mail/Ph Update  
NCB Update

**Move**  
Client to HH  
HH to Residence  
Merge HH

**Energy Education**  
View  
Kit Component New

### 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	SKURN061595		SSN	SKOR092112	
SSN2			First	KOR	
SSN3			Last	SON-OF-RYNAR	
First	KURN				
Last	SON-OF-MOGH				

**Search**

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-31A: Move Client Screen - Search**

- 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 3-31B*).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:54  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client**  
Search  
View  
New  
Edit

**Residence**  
View  
New  
Edit

**Household**  
View  
Mail/Ph Update  
NCB Update

**Move**  
Client to HH  
HH to Residence  
Merge HH

**Energy Education**  
View  
Kit Component New

### 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	SKURN061595		SSN	SKOR092112	
SSN2			First	KOR	
SSN3			Last	SON-OF-RYNAR	
First	KURN				
Last	SON-OF-MOGH				

**Search**

Select <b>M</b> column to move (select one or more)			Select <b>M</b> column to move (select only one more)				
M	SSN	First	Last	M	SSN	First	Last
<input checked="" type="checkbox"/>	SKURN061595	KURN	SON-OF-MOGH	<input checked="" type="checkbox"/>	SKOR092112	KOR	SON-OF-RYNAR

**Move Client(s) to Household**  
(Household View Screen will appear next)

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-31B: Move Client Screen**

- 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 3-31C.*) The client(s) have been moved to the new HH, the 'Household View' screen will appear reflecting the new household configuration (*reference figure 3-32*).

**OPUS**  
Energy Assistance

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

User: TESTUSER  
Timeout: 18:40  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client**  
Search  
View  
New  
Edit

**Residence**  
View  
New  
Edit

**Household**  
View  
Mail/Ph Update  
NCB Update

**Move**  
Client to HH  
HH to Residence  
Merge HH

**Energy Education**  
View  
Kit Component New

### 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

SSN1	SKURN061595
SSN2	
SSN3	
First	KURN
Last	SON-OF-MOGH

TO Household - Enter at least one

SSN	SKOR092112
First	KOR
Last	SON-OF-RYNAR

Search

Select **M** column to move

M	SSN	First	Last
<input checked="" type="checkbox"/>	SKURN061595	KURN	SON-OF-MOGH
<input type="checkbox"/>	SKOR092112	KOR	SON-OF-RYNAR

move (select only one more)

**Move Client(s) to Household**  
(Household View Screen will appear next)

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-31C: Client Move - Verification**

Agency: OHCS  
Client: KURN SON-OF-MOGH

User: TESTUSER  
Timeout: 19:10  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

### Household View

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

HH Members										Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SKOR092112	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>	SKANG121213	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y
<input type="checkbox"/>	SKOLOTH052430	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	SKURN061595	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

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

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

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

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

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

New Vendor

#### Income Summary

KANG SON-OF-AROK	\$1,200.00
------------------	------------

#### Household Summary

Total Income	\$1,200.00
% of Poverty	5%
% of OMI	2%
Total # of Persons	4
HH Type	Co-Habitants *
Household Subsidized	<input type="checkbox"/>

Make any changes?
Save Changes

#### Address

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828

#### Phones

T	Number	Client Name
W	(503) 988-8888	KOLOTH SON-OF-DAMAR
W	(503) 988-8888	KOR SON-OF-RYNAR
H	(503) 000-9999	KURN SON-OF-MOGH

#### HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-32: Household View Screen - 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 3-33*) and Click on SSN link open up 'Household View' (*reference figure 3-34*). Click on 'HH to Residence' link in the 'Left Nav Bar'. The 'Move Household to Residence' screen will appear (*reference figure 3-35A*).

**NOTE: Absolutely never edit a residence address to move a household to a new address.**

OPUS Energy Assistance

Agency: OHCS

User: TESTUSER  
Timeout: 19:59  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Client Search**

Search Parameters (at least one field required)

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

First Name: KURN City:

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

When you Click in Search Results: Search

Client's SSN = Household Screen Advanced Search

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
SKURN061395	KURN	SON-OF-MOGH	1995			

The link has been left in for an example SYSID# which is not real.

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-33: Client Search Screen - Existing Client Search**

Agency: OHCS  
Client: KURN SON-OF-MOGH

User: TESTUSER  
Timeout: 19:39  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Household View

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

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>		KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y
<input type="checkbox"/>		KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>		KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

Client Vendor (Vendors in red are expired)

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

**New Vendor**

Address

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828

Phones

T	Number	Client Name
W	(503) 988-8888	KOLOTH SON-OF-DAMAR
W	(503) 988-8888	KOR SON-OF-RYNAR
H	(503) 000-9999	KURN SON-OF-MOGH

**Income Summary**

KANG SON-OF-AROK	\$1,200.00
------------------	------------

**Household Summary**

Total Income	\$1,200.00
% of Poverty	5%
% of OMI	2%
Total # of Persons	4
HH Type	Co-Habitants
Household Subsidized	<input type="checkbox"/>

Make any changes? **Save Changes**

**HH Comments**

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-34: HH View Screen - Move existing client to existing residence

**OPUS**  
Energy Assistance

Agency: OHCS  
Client: KURN SON-OF-MOGH

User: TESTUSER  
Timeout: 19:24  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Move Household to Residence

**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"/> 666 PAGH DR #APT 1
First	<input type="text"/> KOR e.g. John	City	<input type="text"/> ENTERPRISe
Last	<input type="text"/> SON-OF-RYNAR e.g. Smith	Zip	<input type="text"/> 97828

**Search**

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-35A:** Move Household to Residence

Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Residence' information, click 'Search' (reference figure 3-35A).

- 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 3-35B). Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected household?'

**OPUS**  
Energy Assistance

Agency: OHCS  
Client: KURN SON-OF-MOGH

User: TESTUSER  
Timeout: 19:52  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Move Household to Residence

**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"/> 666 PAGH DR #APT 1
First	<input type="text"/> KOR e.g. John	City	<input type="text"/> ENTERPRISE
Last	<input type="text"/> SON-OF-RYNAR e.g. Smith	Zip	<input type="text"/> 97828

**Search**

Select ONLY one HH, under the <b>M</b> column.				Select ONLY one Residence, under the <b>M</b> column.	
M	SSN	First	Last	M	Address
<input checked="" type="checkbox"/>	SKOR092112	KOR	SON-OF-RYNAR	<input checked="" type="checkbox"/>	666 PAGH DR APT 1 ENTERPRISE, OR 97828

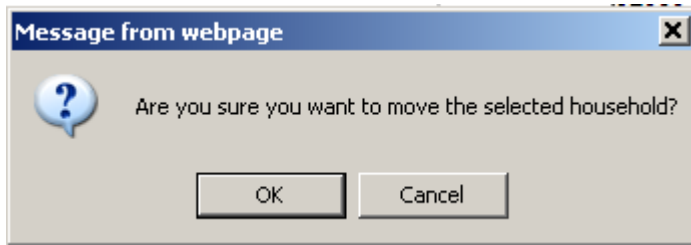
**Move Household to Residence**  
(Household View Screen will appear next)

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-35B:** Move Household to Residence Screen

3. Click 'OK' if the client(s) are correct to complete the move (*reference figure 3-35C*).



**Figure 3-35C:** Confirmation to move to HH to Residence

4. The 'Household View' screen will appear with the client moved (*reference figure 3-36*).



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

User: TESTUSER  
Timeout: 19:48  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Household View

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	██████████	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y	
<input type="checkbox"/>	██████████	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

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

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

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

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

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

New Vendor

### Income Summary

KANG SON-OF-AROK	\$1,200.00
------------------	------------

### Household Summary

Total Income	\$1,200.00
% of Poverty	5%
% of OMI	2%
Total # of Persons	4
HH Type	Co-Habitants *
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

### Address

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828
P	666 PAGH DR APT 1 ENTERPRISE, OR 97828

### Phones

T	Number	Client Name
W	(503) 988-8888	KOLOTH SON-OF-DAMAR
W	(503) 988-8888	KOR SON-OF-RYNAR
H	(503) 000-9999	KURN SON-OF-MOGH

### HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-36: Household View Screen – Clients Merged.

## Move Household to New Residence

### Create New Residence

*Searching to ensure that the residence does not already exist in OPUS is critical to this process. Duplicate residences can cause errors in reporting and calculations. Absolutely never edit a residence address to move a household to a new address.*

### Setup:

While in the 'Client Search' screen.

1. In the address box, type a street number and street name (with spaces between as needed). If a street number isn't available, use a "%" in front of the street name, such as % Stevens St.
2. If there is an apartment or unit number, use one of these formats: Apt #, Unit #, or Spc #.
3. Type a city and zip code to narrow the results to this region of the state.
4. Select 'Search' Button. (reference figure 3-37).

The screenshot shows the OPUS Energy Assistance Client Search interface. The top navigation bar includes the OPUS logo, Agency: OHCS, User: TESTUSER, Timeout: 19:57, and a Log Out button. The main menu on the left includes Client Search, View, New, Edit, Residence, Household, Move, and Energy Education. The search parameters are filled with '%FEDERATION', 'ENTERPRISE', and '97828'. The search button is highlighted. The results section shows 'No Results Found'.

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

Figure 3-37: Client Search Screen - Residence Search

5. If the search results displays a match. **STOP YOU CAN NOT USE THIS PROCESS.** Go to the beginning of **Moves Section** to determine correct type of move process to utilize.
6. If the residence is not in the result list, you'll see 'No Results Found'. A new household and new residence can be created. Click the 'New' link under 'Residence' on the 'Left Nav Bar' (reference figure 3-37).

Agency: OHCS

User: TESTUSER  
Timeout: 19:18  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Residence New

**Physical Address**  

PO Box is not a valid residence address.  
"HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¼ miles past mile post marker 35 on Hwy 166.

No.	Direction	Street Name	Type	Direction	Unit	#
1701	E	FEDERATION	WAY			

City	St.	Zip Code	County
ENTERPRISE-97828	OR	97828-ENTERPRISE	WALLOWA

**Residence Info**  
Residence Type: MFD/Mobile  
Residence Status: Rent (Heat inc)

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

<input checked="" type="checkbox"/> Electric	<input type="checkbox"/> Wood	Primary Source: ELECTRIC
<input type="checkbox"/> Natural Gas	<input type="checkbox"/> Pellet	
<input type="checkbox"/> Oil	<input type="checkbox"/> Solar	
<input type="checkbox"/> Liquid Gas	<input type="checkbox"/> Other	

Save

Data Classification: 2

Oregon Housing and Community Services ©

**Figure 3-38: 'Residence New' Screen**

- Enter the residence information. Item marked by \* are required entries. Select 'Save' to add the new residence to OPUS.
- From the Household View Screen click the 'HH to Residence' link under 'Move' on the 'Left Nav Bar' (reference figure 3-39).

Agency: OHCS  
Client: MISS RED FIVE

User: TESTUSER  
Timeout: 19:48  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Household View

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

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SRED090990	MISS RED FIVE	23	F	HSD	N	N	RF	S	Y	N
<input type="checkbox"/>	SRED100110	RED SIX	3	F	NO	N	N	DK	S	N	N

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

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

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

Vendor	Type	Pri	Acct#	Name/Acct
--------	------	-----	-------	-----------

**New Vendor**

**Address**

T	Address
M	ADDRESS UNKNOWN PORTLAND, OR 97232

**Phones**

T	Number	Client Name
---	--------	-------------

**Household Summary**

Total Income	\$0.00
% of Poverty	0%
% of OMI	0%
Total # of Persons	2
HH Type	
Household Subsidized	<input type="checkbox"/>

Make any changes? **Save Changes**

**HH Comments**

2000 characters left (spaces count)

**Data Classification: 3**

Oregon Housing and Community Services ©

**Figure 3-39: Household View' Screen**

Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Residence' information, click 'Search' (reference figure 3-40).

- The HH to be moved 'FROM Household' and the 'TO Residence' information will appear. Check the appropriate box(es) to complete the move. Click on 'Move Household to Household' button (reference figure 3-40). Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected household?' (reference figure 3-40A).

Agency: OHCS

User: TESTUSER  
Timeout: 19:38  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

### Move Household to Residence

**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**  
SSN  e.g. 000-00-0000  
First  RED e.g. John  
Last  FIVE e.g. Smith

**TO Residence**  
Address  %FEDERATION =   
City  ENTERPRISE  
Zip  97828

Select ONLY one HH, under the **M** column.  
☒ M SSN  BRED090990 First  RED Last  FIVE

Select ONLY one Residence, under the **M** column.  
☐ M Address   
☐ 2893 FEDERATION WAY  
ENTERPRISE, OR 97828  
☐ 1701D FEDERATION BLVD STE 10F  
ENTERPRISE, OR 97828  
☒ 1701 E FEDERATION WAY  
ENTERPRISE, OR 97828

(Household View Screen will appear next)

Data Classification: 3

Figure 3-40: 'Move Household to Residence' Screen

Agency: OHCS

User: TESTUSER  
Timeout: 18:41  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

### Move Household to Residence

**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**  
SSN  e.g. 000-00-0000  
First  RED e.g. John  
Last  FIVE

**TO Residence**  
Address  %FEDERATION =   
City  ENTERPRISE  
Zip  97828

Select ONLY one HH, un  
☒ M SSN  SRED090990

Select ONLY one Residence, under the **M** column.  
☐ M Address   
☐ N WAY  
97828  
☐ 1701D FEDERATION BLVD STE 10F  
ENTERPRISE, OR 97828  
☒ 1701 E FEDERATION WAY  
ENTERPRISE, OR 97828

(Household View Screen will appear next)

Data Classification: 3


☒ M SSN  SRED090990

Select ONLY one Residence, under the **M** column.  
☐ M Address   
☐ N WAY  
97828  
☐ 1701D FEDERATION BLVD STE 10F  
ENTERPRISE, OR 97828  
☒ 1701 E FEDERATION WAY  
ENTERPRISE, OR 97828

(Household View Screen will appear next)


Figure 3-40A: Confirmation to move to HH to Residence

10. The 'Household View' screen will appear with the household moved to the new residence (reference figure 3-41).



Agency: OHCS  
Client: MISS RED FIVE  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:47  
Log Out



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

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

Household View

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

HH Members					Bold Red elements indicate poor data quality							
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SRED090990	MISS RED FIVE	23	F	HSD	N	N	RF	S	Y	N	
<input type="checkbox"/>	SRED100110	RED SIX	3	F	NO	N	N	DK	S	N	N	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

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

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

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

Client Vendor (Vendors in red are expired)

Vendor	Type	Pri	Acct#	Name/Acct
New Vendor				

Address

T	Address
P	1701 E FEDERATION WAY ENTERPRISE, OR 97828
M	ADDRESS UNKNOWN PORTLAND, OR 97232

Phones

T	Number	Client Name
---	--------	-------------

Household Summary

Total Income	\$0.00
% of Poverty	0%
% of OMI	0%
Total # of Persons	2
HH Type	<input type="text"/> *
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-41: 'Household View' Screen after move to New Residence.

## Move Household to Existing Residence

1. From the Household View Screen click the 'HH to Residence' link under 'Move' on the 'Left Nav Bar' (reference figure 3-42).

**OPUS Energy Assistance** Agency: OHCS Client: MISS RED FIVE User: TESTUSER Timeout: 19:48 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help

**Household View** Version 3.0.4T

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

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SRED090990	MISS RED FIVE	23	F	HSD	N	N	RF	S	Y	N
<input type="checkbox"/>	SRED100110	RED SIX	3	F	NO	N	N	DK	S	N	N

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

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

Vendor	Type	Pri	Acct#	Name/Acct
--------	------	-----	-------	-----------

**New Vendor**

**Address**

T	Address
M	ADDRESS UNKNOWN PORTLAND, OR 97232

**Phones**

T	Number	Client Name
---	--------	-------------

**Household Summary**

Total Income	\$0.00
% of Poverty	0%
% of OMI	0%
Total # of Persons	2
HH Type	
Household Subsidized	<input type="checkbox"/>

Make any changes? **Save Changes**

**HH Comments**

2000 characters left (spaces count)

**Data Classification: 3**

Oregon Housing and Community Services ©

Figure 3-42: Household View' Screen

2. Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Residence' information, click 'Search' (reference figure 3-43A).
3. The HH to be moved 'FROM Household' and the 'TO Residence' information will appear. Check the appropriate box(es) to complete the move. Click on 'Move Household to Household' button (reference figure 3-43A). Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected household?' (reference figure 3-43B).

**OPUS Energy Assistance** Agency: OHCS User: TESTUSER Timeout: 19:38 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help

**Client**  
Search  
View  
New  
Edit

**Residence**  
View  
New  
Edit

**Household**  
View  
Mail/Ph Update  
NCB Update

**Move**  
Client to HH  
HH to Residence  
Merge HH

**Energy Education**  
View  
Kit Component New

## Move Household to Residence

**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**

SSN  e.g. 000-00-0000

First  RED e.g. John

Last  FIVE e.g. Smith

**TO Residence**

Address  %FEDERATION

City  ENTERPRISE

Zip  97828

**Select ONLY one HH, under the M column.**

M	SSN	First	Last
<input checked="" type="radio"/>	SRED090990	RED	FIVE

**Select ONLY one Residence, under the M column.**

M	Address
<input type="radio"/>	2893 FEDERATION WAY ENTERPRISE, OR 97828
<input type="radio"/>	1701D FEDERATION BLVD STE 10F ENTERPRISE, OR 97828
<input checked="" type="radio"/>	1701 E FEDERATION WAY ENTERPRISE, OR 97828

**Search**

**Move Household to Residence**  
(Household View Screen will appear next)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-43A: 'Move Household to Residence' Screen

**OPUS Energy Assistance** Agency: OHCS User: TESTUSER Timeout: 18:41 Log Out Oregon Housing and Community Services

Client Program Fiscal Management Reports Help

**Client**  
Search  
View  
New  
Edit

**Residence**  
View  
New  
Edit

**Household**  
View  
Mail/Ph Update  
NCB Update

**Move**  
Client to HH  
HH to Residence  
Merge HH

**Energy Education**  
View  
Kit Component New

## Move Household to Residence

**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**

SSN  e.g. 000-00-0000

First  RED e.g. John

Last  FIVE

**TO Residence**

Address  %FEDERATION

City  ENTERPRISE

Zip

**Select ONLY one HH, under the M column.**

M	SSN	First	Last
<input checked="" type="radio"/>	SRED090990	RED	FIVE

**Select ONLY one Residence, under the M column.**

M	Address
<input type="radio"/>	2893 FEDERATION WAY ENTERPRISE, OR 97828
<input type="radio"/>	1701D FEDERATION BLVD STE 10F ENTERPRISE, OR 97828
<input checked="" type="radio"/>	1701 E FEDERATION WAY ENTERPRISE, OR 97828

**Search**

**Are you sure you want to move the selected household?**

**OK** **Cancel**

**Move Household to Residence**  
(Household View Screen will appear next)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-43B: Confirmation to move to HH to Residence

- The 'Household View' screen will appear with the household moved to the new residence (reference figure 3-44).



Agency: OHCS  
Client: MISS RED FIVE  
Residence: ENTERPRISE, OR 97828

User: TESTUSER  
Timeout: 19:47  
Log Out

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

Version 3.0.4T

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

## Household View

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

HH Members						Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SRED090990	MISS RED FIVE	23	F	HSD	N	N	RF	S	Y	N	
<input type="checkbox"/>	SRED100110	RED SIX	3	F	NO	N	N	DK	S	N	N	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

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

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

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

Client Vendor (Vendors in red are expired)

Vendor	Type	Pri	Acct#	Name/Acct
New Vendor				

Address

T	Address
P	1701 E FEDERATION WAY ENTERPRISE, OR 97828
M	ADDRESS UNKNOWN PORTLAND, OR 97232

Phones

T	Number	Client Name
---	--------	-------------

Household Summary

Total Income	\$0.00
% of Poverty	0%
% of OMI	0%
Total # of Persons	2
HH Type	<input type="text"/>
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-44: 'Household View' Screen after move to New 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 3-45*).

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

User: TESTUSER  
Timeout: 19:55  
[Log Out](#)

Client  
Search  
View  
New  
Edit  
  
Residence  
View  
New  
Edit  
  
Household  
View  
Mail/Ph Update  
NCB Update  
  
Move  
Client to HH  
HH to Residence  
**Merge HH**  
  
Energy Education  
View  
Kit Component New

### Household View

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SKOR092112	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	SKANG121213	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y	
<input type="checkbox"/>	SKOLOTH052430	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	SKURN061595	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y	

[New Client](#)
[Remove Client\(s\) from Household](#)

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](#)

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

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

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

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

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

[New Vendor](#)

#### Income Summary

KANG SON-OF-AROK	\$1,200.00
------------------	------------

#### Household Summary

Total Income	\$1,200.00
% of Poverty	5%
% of OMI	2%
Total # of Persons	4
HH Type	Co-Habitants
Household Subsidized	<input type="checkbox"/>

Make any changes? [Save Changes](#)

#### HH Comments

2000 characters left (spaces count)

#### Address

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828
P	666 PAGH DR APT 1 ENTERPRISE, OR 97828

#### Phones

T	Number	Client Name
W	(503) 988-8888	KOLOTH SON-OF-DAMAR
W	(503) 988-8888	KOR SON-OF-RYNAR
H	(503) 000-9999	KURN SON-OF-MOGH

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-45: HH View Screen 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.

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:45  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

**Merge Households**

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

Enter HH to **Move FROM**

SSN  
First: WOLF  
Last: SON-OF-MOGH

Enter HH to **Merge TO**

SSN  
First: KOR  
Last: SON-OF-RYNAR

**AND**

**FROM** (select only one)

M SSN	First	Last
<input checked="" type="radio"/> SWORF040365	WOLF	SON-OF-MOGH

**TO** (select only one)

M SSN	First	Last
<input checked="" type="radio"/> KOR092112	KOR	SON-OF-RYNAR

**#3 Merge Households**  
(Household View Screen will appear next)

**#4** Are you sure you want to merge the selected households?  
OK Cancel

**#2 Search**

**#1**

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-46: HH View processing merge.

3. The Household View screen appears. The merge is completed (reference figure 3-47).

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

User: TESTUSER  
Timeout: 19:58  
Log Out

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

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Client  
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[View](#)  
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[Edit](#)

Residence  
[View](#)  
[New](#)  
[Edit](#)

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

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

Energy Education  
[View](#)  
[Kit Component New](#)

## Household View

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	██████████	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y	
<input type="checkbox"/>	██████████	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N	
<input type="checkbox"/>	██████████	K'EHLYR WORF	34	F	AA	N	N	H	S	N	N	
<input type="checkbox"/>	██████████	ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N	
<input type="checkbox"/>	██████████	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

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

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

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

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

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

New Vendor

#### Income Summary

KANG SON-OF-AROK	\$1,200.00
------------------	------------

#### Address

T	Address
M	999 PAGH ST ENTERPRISE, OR 97828
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
P	666 PAGH DR APT 1 ENTERPRISE, OR 97828

#### Phones

T	Number	Client Name
H	(800) 555-9422	ALEXANDER ROZHENKO
H	(800) 555-9422	K'EHLYR WORF
W	(503) 988-8888	KOLOTH SON-OF-DAMAR
W	(503) 988-8888	KOR SON-OF-RYNAR
H	(503) 000-9999	KURN SON-OF-MOGH
C	(503) 999-0000	WORF SON-OF-MOGH
H	(800) 555-9422	WORF SON-OF-MOGH

#### Household Summary

Total Income	\$1,200.00
% of Poverty	3%
% of OMI	1%
Total # of Persons	7
HH Type	Co-Habitants ▾ +
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

#### HH Comments

2000 characters left (spaces count)

Data Classification: 3

Figure 3-47: HH View Screen - Merge Completed.

4. Update mailing address for Household (reference figure 3-48).

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 3-48).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:39  
Log Out

Client Program Fiscal Management Reports Help

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### Household Mail and Phone Update

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

999 PAGH ST - ENTERPRISE OR, 97828  
ADDRESS UNKNOWN - ENTERPRISE OR, 97828  
ADDRESS UNKNOWN - ENTERPRISE OR, 97828  
**RES-666 PAGH DRAPT - ENTERPRISE OR, 97828**  
--Select One--

Type Direction Unit #  
+4 County

**Update Mailing Address**

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

**KOR SON-OF-RYNAR**  
Phone: 503-988-8888 Type: WORK Edit Delete  
Phone: Ext: Type: CELL Add Add HH Delete HH

**KOLOTH SON-OF-**  
Phone: 503-988-8888 Type: WORK Edit Delete  
Phone: Ext: Type: CELL Add Add HH Delete HH

**KANG SON-OF-AROK**  
Phone: Ext: Type: CELL Add Add HH Delete HH

**WORF SON-OF-MOGH**  
Phone: 503-999-0000 Type: CELL Edit Delete  
Phone: 800-555-9422 Type: HOME Edit Delete  
Phone: Ext: Type: CELL Add Add HH Delete HH

**ALEXANDER ROZHENKO**  
Phone: 800-555-9422 Type: HOME Edit Delete  
Phone: Ext: Type: CELL Add Add HH Delete HH

**Message from webpage**  
Are you sure you want to update Mailing address for the entire Household?  
**OK** Cancel

Data Classification: 3  
Oregon Housing and Community Services ©

Figure 3-48: Household Mail and Phone Update Screen - Update Household Mailing Address

## Client Vendor Edit, Remove, New Vendor

Periodically, client vendor records need to be updated with new account numbers, or a household may be serviced through a different vendor.

### Setup:

On the Household View screen.

Find the 'Client-Vendor' section, under the 'Programs' section. To edit or remove the Vendor click on the 'Vendor' name link (*reference figure 3-49*).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:37  
Log Out

Client Program Fiscal 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.

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>	[REDACTED]	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y
<input type="checkbox"/>	[REDACTED]	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N
<input type="checkbox"/>	[REDACTED]	K'EHLYR WORF	34	F	AA	N	N	H	S	N	N
<input type="checkbox"/>	[REDACTED]	ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N
<input type="checkbox"/>	[REDACTED]	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

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

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

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

**New Vendor**

### Income Summary

KANG SON-OF-AROK	\$1,200.00
------------------	------------

### Household Summary

Total Income	\$1,200.00
% of Poverty	3%

Figure 3-49: Household View Screen – Client - Vendor.

## Client Vendor Edit

The 'Client Vendor' screen will appear. The 'Client Vendor' screen allows client household information to be updated. The 'Client' drop-down box will allow different names to be chosen within the specific household. From this screen you can make changes and then select the 'Save Changes' button (*reference figure 3-50A*).

## Client Vendor Remove

You can remove the vendor by selecting the 'Remove'. This button initiates a double check asking 'Are you sure you want to Remove Vendor'. Select OK to proceed with the removal or CANCEL (reference figure 3-50B).

The screenshot shows the 'Client Vendor Edit' screen in the OPUS Energy Assistance system. The interface includes a top header with the OPUS logo, agency information (OHCS, Client: KOR SON-OF-RYNAR, Residence: ENTERPRISE, OR 97828), user information (User: TESTUSER, Timeout: 19:34), and a 'Log Out' button. A navigation menu on the left lists various actions like Client Search, View, New, Edit, Residence View, New, Edit, Household View, Mail/Ph Update, NCB Update, Move, Client to HH, HH to Residence, Merge HH, Energy Education, View, Kit Component New, and Energy Education. The main content area is titled 'Client Vendor Edit' and contains several sections: 'Vendor Information' (Fields marked with \* are required.) with fields for Client (KOR SON-OF-RYNAR), Name on Acct (KOR SON-OF-RYNAR), Account # (999-KOR-97828), and Vendor/Heat Type (PORTLAND GENERAL ELECTRIC / Electric); 'Verification' with fields for Intake-Worker (TNU), Date (11-11-2013), and Type (Copy of Bill); and 'Comments' with a text area for comments and a 'Remove' button. The 'Save Changes' button is circled in red. The bottom of the screen shows the Oregon Housing and Community Services logo and the text 'Data Classification: 3'.

**Figure 3-50A:** Client Vendor Edit Screen – Save Changes.

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

User: TESTUSER  
Timeout: 18:10  
Log Out

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[Edit](#)

Residence  
[View](#)  
[New](#)  
[Edit](#)

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

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

Energy Education  
[View](#)  
[Kit Component New](#)

## Client Vendor Edit

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

Client: KOR SON-OF-RYNAR \*  
Name on Acct: KOR SON-OF-RYNAR \* (may/may not be same as Client)  
Account #: 999-KOR-97828  
Vendor/Heat Type: PORTLAND GENERAL ELECTRIC / Electric

Verification

Intake-Worker: TNU Date: 11-11-2013 (mm-dd-yyyy) Type: Copy of Bill

Comments

Comments for vendors

1969 characters left (spaces count)

Remove

Save Changes

Message from webpage

Are you sure you want to Remove Vendor?

OK Cancel

Oregon Housing and Community Services ©


Data Classification: 3

**Figure 3-50B: Client Vendor Edit Screen – Remove/Confirmation**




## Client Vendor New

To add a new vendor, click the 'New Vendor' button (*reference figure 3-51*) and the 'Client Vendor New' screen will appear. The 'Client Vendor New' screen allows a new vendor to be used for a specific client enter the required information into the appropriate fields and click the 'Save' button (*reference figure 3-52*). The Household view screen will appear with the new vendor added (*reference figure 3-53*).



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

User: TESTUSER  
Timeout: 19:37  
Log Out



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

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Residence  
[View](#)  
[New](#)  
[Edit](#)

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

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

Energy Education  
[View](#)  
[Kit Component New](#)

### Household View

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	██████████	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y	
<input type="checkbox"/>	██████████	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N	
<input type="checkbox"/>	██████████	K'EHLYR WORF	34	F	AA	N	N	H	S	N	N	
<input type="checkbox"/>	██████████	ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N	
<input type="checkbox"/>	██████████	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

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

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

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

Client Vendor (Vendors in red are expired)

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

New Vendor

Income Summary

KANG SON-OF-AROK	\$1,200.00
------------------	------------

Household Summary

Total Income	\$1,200.00
% of Poverty	3%

Figure 3-51: Household View Screen – New Vendor Button.

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

User: TESTUSER  
Timeout: 18:24  
Log Out

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

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**Client**  
[Search](#)  
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[Edit](#)

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

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

**Energy Education**  
[View](#)  
[Kit Component New](#)

## Client Vendor New

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

Client:  \*

Name on Acct:  \* (may/may not be same as Client)

Account #:

Vendor/Heat Type:  \*

Verification

Intake-Worker:  Date:  (mm-dd-yyyy) Type:

Comments

1955 characters left (spaces count)

**Save**

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-52: Client Vendor New Screen.**

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

User: TESTUSER  
Timeout: 19:55  
Log Out

Client   Program   Fiscal   Management   Reports   Help

Client  
Search  
View  
New  
Edit

Residence  
View  
New  
Edit

Household  
View  
Mail/Ph Update  
NCB Update

Move  
Client to HH  
HH to Residence  
Merge HH

Energy Education  
View  
Kit Component New

### Household View

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

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>		KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y
<input type="checkbox"/>		KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>		WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N
<input type="checkbox"/>		K'EHLYR WORF	34	F	AA	N	N	H	S	N	N
<input type="checkbox"/>		ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N
<input type="checkbox"/>		KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

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

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

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

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

Vendor	Type	Pri	Acct#	Name/Acct
NORTHWEST NATURAL	N	N	G456789-2013	KANG SON-OF-AROK
PORTLAND GENERAL ELECTRIC	E	Y	999-KOR-97828	KOR SON-OF-RYNAR

New Vendor

#### Income Summary

KANG SON-OF-AROK	\$1,200.00
------------------	------------

#### Household Summary

Total Income	\$1,200.00
% of Poverty	3%
% of OMI	1%
Total # of Persons	7

Figure 3-53: Household View Screen – Vendor Added.

## Payment Edit, Void and Deny

At times, a client's payment assistance record needs to be edited to change something about a payment. At other times, a payment may need to be voided or denied due to program limitations, or depleted program funds.

On the 'Household View' screen, find the 'Programs' section, under the client information section. Programs that a household has received assistance from will be listed as a link (blue and underlined text) to the associated payment view screen (*reference figure 3-49*). If the link has been used within a short period of time the color would be a dark pink.

The household view screen offers a "quick" view of information about a payment such as the: amount, check number, date, authorization number, payment type and payment status. Only a payment in "Pending Status" can be edited, if needed. Once the payment has been authorized by a manager and labeled "Authorized" under the Payment Status column, the payment cannot be edited.

Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)						
Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LP14	\$0.00			C16112659	Standard	Deny

Payments - Previous Household (Sorted by Name then Auth #, click header to change secondary sort)						
Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LPSP14	\$350.00	9999	11-07-2013	C16112660	Combo	Agency Paid

**Figure 3-54:** HH view, Program Payment View Screen

## Payment Edit

### Setup:

On the Household View screen.

1. Find the Programs section, under the household information section.

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 17:03  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Household View

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

**HH Members**

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	██████████	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>	██████████	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y
<input type="checkbox"/>	██████████	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	██████████	WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N
<input type="checkbox"/>	██████████	K'EHLYR WORF	34	F	AA	N	N	H	S	N	N
<input type="checkbox"/>	██████████	ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N
<input type="checkbox"/>	██████████	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LPSP14	\$350.00	9999-12	11-07-2012	C16112660	Combo	Agency Paid

Figure 3-55A: HH View Program, Payments

2. Click the 'Payment' link you want to edit "blue and underlined link". The Payment View screen will appear (reference figure 3-56). When a link has been used previous within a short period of time the link can be a different color (dark pink). This can be used as a quickly located tool to find a link previously reviewed.

**NOTE:** If you select a payment from a previous household a warning will display "You are about to leave this household and go to another household that originally received this payment. Are you sure you want to leave this household?" (reference figure 3-55B) select OK to proceed or CANCEL to return to current HH screen.

Message from webpage

? You are about to leave this household and go to another household that originally received this payment. Are you sure you want to leave this household?

OK Cancel

Figure 3-55B: HH View Program, Payments Warning

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

User: TESTUSER  
Timeout: 19:49  
[Log Out](#)

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

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Payment  
Search  
View  
New  
Edit

## Payment View

APC: CCN-LP14-WAL-LIHEAP 2014 [Edit Payment](#)

PAYMENT REPORTS

Intake Report
Intake Disclaimer
Notice of Action
No Income

[Payment Receipt](#)

**Note:** Click on the blue diamond to view the report definitions.  
Many report definitions reference [Attachment A](#). Click to view attachment.

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

**Applicant Information**

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

**Payment Information**

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

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

**Comments on Payment**

Client did not return signed application.

**Payment Details (by Vendor)**

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

[Data Classification: 3](#)

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Figure 3-56: Payment View.

- The 'Payment View' screen provides details about a specific payment. At the bottom of the screen, is a section called 'Payment Details by vendor'. This section provides a tracking system, by vendor, for each stage of a payment cycle from "Pending" to "Agency Paid".
- Click the 'Payment Edit' button (*reference figure 3-56*). The Payment Edit screen will appear (*reference figure 3-57*). **Note:** Payments in "Pending" status and the current household can be edited.
- A different APC may be chosen from the drop-down menu, then click the 'Load' button. This "re-qualifies" the household under the new APC fund type. Once Accepted, reference 'Payment Eligibility Status' section (middle of screen), then proceed and fill out the rest of the information, then click 'Save Changes' button. The 'Payment View' screen will re-appear with the changes made and with the new APC qualification assigned to the payment (*reference figure 3-57*).

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

User: TESTUSER  
Timeout: 19:55  
Log Out

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

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

### Payment Edit - Agency

Fields Marked \* are required.

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

APC:  \*

**User Information**

Select Applicant:  \* Intake Date:  (mm-dd-yyyy) \*  
HH Income: \$4,200.00 Intake Worker:  \*  
Current HH Income: \$1,200.00 Subsidized: **N**  
Household Count: 2  
Current Household Count: 7  
Energy Type:  \*  
Referral for Weatherization ☒  
Non Energy Services ☐  
Energy Related Advocacy ☐  
Override Children Blocking ☐ ☐ **Requalify household?** (this will update all client, household and residence information including household count, income, subsidized status and heat type)

Payment Eligibility Status: **ACCEPTED**

**Payment Information**

Payment Type:  \* Auth #:  \*

Vendor	Amount	Account Status	Primary	Name on Acct
				Acct #
NORTHWEST NATURAL	0.00	CURRENT		KURN SON-OF-MOGH
				G98765-2011
NORTHWEST NATURAL	0.00	CURRENT		KANG SON-OF-AROK
				G456789-2013
PORTLAND GENERAL ELECTRIC	.00	CURRENT	YES	KOR SON-OF-RYNAR
				999-KOR-97828
Direct Pay	0.00	CURRENT		
Agency	0.00	CURRENT		
<b>Total</b>	\$0.00			<b>Balance</b> \$480.00

**Comments**

Client did not return signed application.

1959 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-57: Payment Edit – Agency Screen.

## Requalify Household

If any changes are made to the household configuration you must requalify the household by selecting the 'Requalify Household' check box and selecting the 'Load' button (*reference figure 3-58*). If you do not requalify the household the changes will not be displayed.

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

User: TESTUSER  
Timeout: 19:55  
Log Out

Oregon  
Housing and Community Services

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

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

### Payment Edit - Agency

Fields Marked \* are required.

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

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

**User Information**

Select Applicant: KOR SON-OF-RYNAR \* Intake Date: 10-29-2013 (mm-dd-yyyy) \*  
HH Income: \$4,200.00 Intake Worker: TNU \*  
Current HH Income: \$1,200.00 Subsidized: N  
Household Count: 2  
Current Household Count: 7  
Energy Type: ELECTRIC \*  
Referral for Weatherization ☒  
Non Energy Services ☐  
Energy Related Advocacy ☐  
Override Children Blocking ☐

☒ **Requalify household?** (This will update all client, household and residence information including household count, income, subsidized status and heat type)

Payment Eligibility Status: ACCEPTED  
Void Payment Deny Payment Hold Payment

**Payment Information**

Payment Type: Standard Min-480 Max-480 *	Auth #: C16112659 *
--	---------------------

Vendor	Amount	Account Status	Primary	Name on Acct
NORTHWEST NATURAL	0.00	CURRENT		KURN SON-OF-MOGH
NORTHWEST NATURAL	0.00	CURRENT		G98765-2011
PORTLAND GENERAL ELECTRIC	0.00	CURRENT	YES	KOR SON-OF-RYNAR
Direct Pay	0.00	CURRENT		999-KOR-97828
Agency	0.00	CURRENT		
<b>Total</b>	\$0.00			<b>Balance</b> \$480.00

**Comments**  
Client did not return signed application.  
1959 characters left (spaces count)

Save Changes

Data Classification: 3  
Oregon Housing and Community Services ©

Figure 3-58: Payment Edit Agency Screen – Requalify Household.



## Payment Void

A Payment can only be voided if it is in a 'Pending Status' for the current household. In a similar way, a user can edit a payment or deny it, as long as the payment is in 'Pending' status for the current household. In general, it will be a rare occasion to void payments in OPUS, unless there is a specific reason such as a depletion of grant funds, or some other reason. Therefore, the 'Payment View' and 'Payment Edit' screens may be used frequently to change a *pending* payment's information.

### Setup:

1. On the Household View screen, locate the 'Programs' section located under the household information section (*reference figure 3-59*).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:54  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Household View

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

HH Members										Bold Red elements indicate poor data quality		
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	[REDACTED]	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	[REDACTED]	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y	
<input type="checkbox"/>	[REDACTED]	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	[REDACTED]	WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N	
<input type="checkbox"/>	[REDACTED]	K'EHLYR WORF	34	F	AA	N	N	H	S	N	N	
<input type="checkbox"/>	[REDACTED]	ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N	
<input type="checkbox"/>	[REDACTED]	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y	

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LPSP14	\$350.00	9999-12	11-07-2012	C16112660	Combo	Agency Paid

Client Vendor (Vendors in red are expired) Income Summary

Figure 3-59: Household View Screen – Program Links

2. Under 'Payments', click the payment link that is in the 'Pending' status needing to be voided. The 'Payment View' screen will appear.
3. Click on the 'Edit Payment' button or the "Edit" link under Payment on the Left Nav Bar (*reference figure 3-60*).

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

User: TESTUSER  
Timeout: 19:46  
Log Out

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

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

## Payment View

APC: CCN-LP14-WAL-LIHEAP 2014

[Edit Payment](#)

PAYMENT REPORTS

[Intake Report](#)
[Intake Disclaimer](#)
[Notice of Action](#)
[No Income](#)

[Payment Receipt](#)

Note: Click on the blue diamond to view the report definitions.  
Many report definitions reference [Attachment A](#). Click to view attachment.

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

### Applicant Information

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

### Payment Information

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

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

### Comments on Payment

Client did not return signed application.

### Payment Details (by Vendor)

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-60: Payment View Screen to Edit Payment Screen.

- The 'Payment Edit – Agency' screen will appear. In the comments box, enter the reason why the payment is being voided. It should be a standard operating procedure to enter 'Date', 'Comment(s)' and the 'intake worker's initials' (reference figure 3-61).

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

User: TESTUSER  
Timeout: 19:49  
Log Out

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

Payment  
Search  
View  
New  
Edit

## Payment Edit - Agency

Fields Marked \* are required.

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

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

**User Information**

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

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

Current HH Income: \$1,200.00 Subsidized: N

Household Count: 2

Current Household Count: 7

Energy Type: ELECTRIC \*

☒ Referral for Weatherization  
☐ Non Energy Services  
☐ Energy Related Advocacy

Override Children Blocking: ☐ ☐ **Requalify household?** (this will update all client, household and residence information including household count, income, subsidized status and heat type)

Load

Payment Eligibility Status: ACCEPTED

Void Payment Deny Payment Hold Payment

**Payment Information**

Payment Type: Standard Min-480 Max-480 \* Auth #: C16112659 \*

Vendor	Amount	Account Status	Primary	Name on Acct
				Acct #
NORTHWEST NATURAL	0.00	\$ CURRENT		KURN SON-OF-MOGH
				G98765-2011
NORTHWEST NATURAL	0.00	\$ CURRENT		KANG SON-OF-AROK
				G456789-2013
PORTLAND GENERAL ELECTRIC	.00	\$ CURRENT	YES	KOR SON-OF-RYNAR
				999-KOR-97828
Direct Pay	0.00	\$ CURRENT		
Agency	0.00	\$ CURRENT		
<b>Total</b>	\$0.00			<b>Balance</b> \$480.00

**Comments**

When payments are voided. Comments need to be added. As standard operating procedure; start with "Date", enter comments, end with intake works initials.

1846 characters left (spaces count)

Save Changes

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-61: Payment Edit – Agency to Void Payment Screen

- Click the 'Void Payment' button at top (reference figure 3-61). The 'Payment View' screen will re-appear with the payment labeled 'Voided' in the Payment Detail Section in the lower part of the Payment View screen.

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

User: TESTUSER  
Timeout: 19:52  
Log Out

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

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

## Payment View

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

PAYMENT REPORTS

Intake Report
Intake Disclaimer
Notice of Action
No Income

Payment Receipt

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

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

### Applicant Information

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

### Payment Information

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

Vendor	Amount	Primary	Account Status	Status	Name on Acct	Acct #
NORTHWEST NATURAL	\$0.00	N	CURRENT	Void	KURN SON-OF-MOGH	G98765-2011
<b>Total</b>	\$0.00					

### Comments on Payment

When payments are placed on Hold. Comments need to be added. As standard operating procedure; start with "Date", enter comments, end with intake works initials.

### Payment Details (by Vendor)

NORTHWEST NATURAL	Pending 11-07-2013	Batched	Check#
Agency Paid	Authorized	Batch #	Check Date

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-62: Payment View – Voided Screen

## Payment Deny

A Payment can only be Denied if it is in a 'Pending Status' for the current household. In a similar way, a user can edit a payment or void it, as long as the payment is in 'Pending' status for the current household. In general, on the occasion that a payment is denied, there is will be a specific reason such as a over income, or some other reason. Therefore, the 'Payment View' and 'Payment Edit' screens may be used frequently to change a *pending* payment's information.

### Setup:

1. On the Household View screen, locate the 'Payments' section located under the household information section (*reference figure 3-63*).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:54  
Log Out

Client Program Fiscal Management Reports Help

Version 3.0.4T

### Household View

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

HH Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y
<input type="checkbox"/>	[REDACTED]	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y
<input type="checkbox"/>	[REDACTED]	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N
<input type="checkbox"/>	[REDACTED]	K'EHLYR WORF	34	F	AA	N	N	H	S	N	N
<input type="checkbox"/>	[REDACTED]	ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N
<input type="checkbox"/>	[REDACTED]	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LPSP14	\$350.00	9999-12	11-07-2012	C16112660	Combo	Agency Paid

Client Vendor (Vendors in red are expired) Income Summary

Figure 3-63: Household View – Payment Links

2. Under 'Payments', click the payment link that is in the 'Pending' status needing to be voided. The 'Payment View' screen will appear.

- Click on the 'Edit Payment' button (reference figure 3-64).

**OPUS**  
Energy Assistance

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

User: TESTUSER  
Timeout: 19:46  
Log Out

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

Payment View New Edit

**Payment View**

APC: CCN-LP14-WAL-LIHEAP 2014

**EDIT PAYMENT**

PAYMENT REPORTS

Intake Report Intake Disclaimer Notice of Action No Income

Payment Receipt

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

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

**Applicant Information**

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

**Payment Information**

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

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

**Comments on Payment**

Client did not return signed application.

**Payment Details (by Vendor)**

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

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-64: Payment Edit – Agency – to Void Screen.**

- The 'Payment Edit – Agency' screen will appear. In the comments box, enter the reason why the payment is being voided. It should be a standard operating procedure to enter 'Date', 'Comment(s) and the 'intake worker's initials' (reference figure 3-64).

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

User: TESTUSER  
Timeout: 19:49  
Log Out

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

Payment  
Search  
View  
New  
Edit

### Payment Edit - Agency

Fields Marked \* are required.

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

APC:  \*

**User Information**

Select Applicant:  \* Intake Date:  (mm-dd-yyyy) \*

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

Current HH Income: \$1,200.00 Subsidized: **N**

Household Count: 2

Current Household Count: 7

Energy Type:  \*

☒ Referral for Weatherization  
☐ Non Energy Services  
☐ Energy Related Advocacy

Override Children Blocking: ☐ ☐ **Requalify household?** (this will update all client, household and residence information including household count, income, subsidized status and heat type)

Payment Eligibility Status: **ACCEPTED**

**Payment Information**

Payment Type:  \* Auth #:  \*

Vendor	Amount	Account Status	Primary	Name on Acct
				Acct #
NORTHWEST NATURAL	0.00	\$ CURRENT		KURN SON-OF-MOGH
				G98765-2011
NORTHWEST NATURAL	0.00	\$ CURRENT		KANG SON-OF-AROK
				G456789-2013
PORTLAND GENERAL ELECTRIC	.00	\$ CURRENT	YES	KOR SON-OF-RYNAR
				999-KOR-97828
Direct Pay	0.00	\$ CURRENT		
Agency	0.00	\$ CURRENT		
<b>Total</b>	\$0.00			<b>Balance</b> \$480.00

**Comments**

When payments are Denied. Comments need to be added. As standard operating procedure; start with "Date", enter comments, end with intake works initials.

1846 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

**Figure 3-65: Payment Edit Agency Screen - Deny Payment Button**

- Click the 'Deny Payment' button at top (reference figure 3-65). The 'Payment View' screen will re-appear with the payment labeled 'Deny' in the Payment Detail Section in the lower part of the Payment View screen (reference figure 3-66).

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

User: TESTUSER  
Timeout: 19:52  
Log Out

Client
Program
Fiscal
Management
Reports
Help

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

## Payment View

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

PAYMENT REPORTS

Intake Report
Intake Disclaimer
Notice of Action
No Income

Payment Receipt

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

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

### Applicant Information

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

### Payment Information

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

Vendor	Amount	Primary	Account Status	Status	Name on Acct	Acct #
NORTHWEST NATURAL	\$0.00	N	CURRENT	Deny	KURN SON-OF-MOGH	G98765-2011
<b>Total</b>	\$0.00					

### Comments on Payment

When payments are placed on Hold. Comments need to be added. As standard operating procedure; start with "Date", enter comments, end with intake works initials.

### Payment Details (by Vendor)

NORTHWEST NATURAL	Pending 11-07-2013	Batched	Check#
Agency Paid	Authorized	Batch #	Check Date

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-66: Payment View – Denied Screen



## Payment Hold

A Payment can only be placed in Hold if it is in a 'Pending Status' for the current household. In a similar way, a user can edit a payment, deny or void it, as long as the payment is in 'Pending' status for the current household. In general, it will be a rare occasion to place payments in a Hold status, unless there is a specific reason such as a depletion of grant funds, or some other reason. Therefore, the 'Payment View' and 'Payment Edit' screens may be used frequently to change a *pending* payment's information.

### Setup:

1. On the Household View screen, locate the 'Payments' section located under the household information section (*reference figure 3-67*).

**OPUS Energy Assistance**

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

User: TESTUSER  
Timeout: 19:54  
Log Out

Oregon Housing and Community Services

Version 3.0.4T

**Household View**

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	[REDACTED]	KOR SON-OF-RYNAR	101	M	PS	Y	N	RF	RF	Y	Y	
<input type="checkbox"/>	[REDACTED]	KANG SON-OF-AROK	99	M	PS	Y	N	H	S	Y	Y	
<input type="checkbox"/>	[REDACTED]	KOLOTH SON-OF-DAMAR	83	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	[REDACTED]	WORF SON-OF-MOGH	48	M	ATC	Y	N	NH	S	N	N	
<input type="checkbox"/>	[REDACTED]	K'EHLYR WORF	34	F	AA	N	N	H	S	N	N	
<input type="checkbox"/>	[REDACTED]	ALEXANDER ROZHENKO	19	M	HSD	Y	N	NH	S	DK	N	
<input type="checkbox"/>	[REDACTED]	KURN SON-OF-MOGH	18	M	GED	Y	N	NH	S	N	Y	

**New Client**

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

To Remove Household: Click this button

**Remove Client(s) from Household**

**Move Entire Household to Unknown**

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

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

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

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LPSP14	\$350.00	9999-12	11-07-2012	C16112660	Combo	Agency Paid

Client Vendor (Vendors in red are expired) | Income Summary

Figure 3-67: Household View Screen – Program Links

3. Under 'Payments', click the payment link that is in the 'Pending' status needing to be voided. The 'Payment View' screen will appear.
3. Click on the 'Edit Payment' button or the "Edit" link under Payment on the Left Nav Bar (*reference figure 3-68*).

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

User: TESTUSER  
Timeout: 19:46  
Log Out

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

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

## Payment View

APC: CCN-LP14-WAL-LIHEAP 2014

**EDIT PAYMENT**

PAYMENT REPORTS

Intake Report
Intake Disclaimer
Notice of Action
No Income

Payment Receipt

Note: Click on the blue diamond to view the report definitions.  
Many report definitions reference [Attachment A](#). Click to view attachment.

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

**Applicant Information**

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

**Payment Information**

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

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

**Comments on Payment**

Client did not return signed application.

**Payment Details (by Vendor)**

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-68: Payment View Screen to Edit Payment Screen.

- The 'Payment Edit – Agency' screen will appear. In the comments box, enter the reason why the payment is being voided. It should be a standard operating procedure to enter 'Date', 'Comment(s)' and the 'intake worker's initials' (reference figure 3-69).

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

User: TESTUSER  
Timeout: 19:49  
Log Out

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

Version 3.0.4T

Payment  
Search  
View  
New  
Edit

### Payment Edit - Agency

Fields Marked \* are required.

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

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

**User Information**

Select Applicant: KOR SON-OF-RYNAR \* Intake Date: 10-29-2013 (mm-dd-yyyy) \*  
HH Income: \$4,200.00 Intake Worker: TNU \*  
Current HH Income: \$1,200.00 Subsidized: N  
Household Count: 2  
Current Household Count: 7  
Energy Type: ELECTRIC \*  
Referral for Weatherization ☒  
Non Energy Services ☐  
Energy Related Advocacy ☐  
Override Children Blocking ☐ **Requalify household?** (this will update all client, household and residence information including household count, income, subsidized status and heat type)

Load

Payment Eligibility Status: ACCEPTED

Void Payment Deny Payment **Hold Payment**

**Payment Information**

Payment Type: Standard Min-480 Max-480 \* Auth #: C16112659 \*

Vendor	Amount	Account Status	Primary	Name on Acct
NORTHWEST NATURAL	0.00	CURRENT		KURN SON-OF-MOGH
NORTHWEST NATURAL	0.00	CURRENT		KANG SON-OF-AROK
PORTLAND GENERAL ELECTRIC	0.00	CURRENT	YES	KOR SON-OF-RYNAR
Direct Pay	0.00	CURRENT		
Agency	0.00	CURRENT		
<b>Total</b>	\$0.00			<b>Balance</b> \$480.00

**Comments**  
When payments are placed on Hold. Comments need to be added. As standard operating procedure; start with "Date", enter comments, end with intake works initials.  
1838 characters left (spaces count)

Save Changes

Data Classification: 3  
Oregon Housing and Community Services ©

**Figure 3-69: Payment Edit – Agency to Void Payment Screen**

- Click the 'Hold Payment' button at top (*reference figure 3-69*). The 'Payment View' screen will re-appear with the payment labeled 'Hold' in the Payment Detail Section in the lower part of the Payment View screen.

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

User: TESTUSER  
Timeout: 19:52  
[Log Out](#)

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

Version 3.0.4T

Payment  
[Search](#)  
[View](#)  
[New](#)  
[Edit](#)

## Payment View

APC: CCN-LP14-WAL-LIHEAP 2014 [Edit Payment](#)

PAYMENT REPORTS

◆ [Intake Report](#)
◆ [Intake Disclaimer](#)
◆ [Notice of Action](#)
◆ [No Income](#)
◆

[Payment Receipt](#)

**Note:** Click on the blue diamond to view the report definitions.  
Many report definitions reference [Attachment A](#). Click to view attachment.

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

**Applicant Information**

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

**Payment Information**

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

Vendor	Amount	Primary	Account Status	Status	Name on Acct	Acct #
NORTHWEST NATURAL	\$0.00	N	CURRENT	Hold	KURN SON-OF-MOGH	G98765-2011
<b>Total</b>	\$0.00					

**Comments on Payment**

When payments are placed on Hold. Comments need to be added. As standard operating procedure; start with "Date", enter comments, end with intake works initials.

**Payment Details (by Vendor)**

<a href="#">NORTHWEST NATURAL</a>	Pending <a href="#">11-07-2013</a>	Batched	Check#
Agency Paid	Authorized	Batch #	Check Date

Data Classification: 3

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Figure 3-70: Payment View – Hold Screen