

Section Two

Client Intake - New

New household records are created in this section. From there, a household (HH) can be enrolled in agency programs, services and household transactions.

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

Client Search

There are two types of client search screens, 'Client Search' and 'Client Search New'.

When to use each specific Search Screen

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

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

Setup:

Log in and start from 'Message of the Day' Screen.

1. Click the 'Client Search' link on the left nav bar or pass your cursor over 'Client' on the main menu and select 'Search' from the dropdown list. The 'Client Search' screen will appear next. (*reference figure 2-1*).
2. An individual search needs to be conducted for each new client and/or each client in the household. Search for clients by name or SSN/System ID (SID or SYSID) without dashes.
3. Click the 'Search' button.

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Client Search View New Edit
Residence View New Edit
Household View Mail/Ph Update NCB Update
Move Client to HH HH to Residence Merge HH

Client Search (Type "Apt, Unit" etc. with #)
SSN/SYSID [] Address [] # []
First Name JAMES City []
Last Name KIRK Zip [] Show Residence Info. only
 Show Residences With Jobs only
Search
Advanced Search

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

Figure 2-1: Client Search Screen

When a search is unsuccessful, a message 'No Results Found' will display under the 'Search Results' section. Repeat the search for each "new client" or "client in the household" (HH) before adding a client to a household. When a search is successful, a client's information will display in the Search Results (*reference figure 2-2*).

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

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

Figure 2-2: No Results Found

A search can be completed by any of the fields provided: SSN, first name, last name, physical address, system ID, city or zip. When a client has a system Identification (SYSID#) different from their social security number, it might be beneficial to remove the SYSID# from the search box, and search only by the first and last name.

Advanced Search

Additionally you can access Advanced Search features by clicking on the ‘Advanced Search’ link (reference figure 2-3A). An advanced search can be completed utilizing system Identification (SYSID#), First Name, Last Name and/or Telephone Number (Ref. (reference figure 2-3B and 2-3C).

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Client Search

(Type "Apt, Unit" etc. with #)
SSN/SYSID [] Address [] = []
First Name JAMES City []
Last Name KIRK Zip [] Show Residence Info. only
 Show Residences With Jobs only
Search

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

[Advanced Search](#)

Figure 2-3A: Client Search Screen

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Advanced Client Search

SSN/SYSID []
First Name [] Last Name []
Phone 5039998422 (portion of phone number, number only, no -)
Search

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

Figure 2-3B: Advanced Client Search Screen

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

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

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

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

Advanced Client Search

SSN/SYSID

First Name Last Name

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

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

Search Results

SSN #	First Name	Last Name	Phone Number
	JAMES	KIRK	503-999-8422

Timeout: 19:55

[Data Classification: 3](#)

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HOME | Logout

Figure 2-3C: Advanced Client Search Screen Results

Note: ‘Search Results’ are displayed for the first 100 records randomly matching the criteria you enter in a given ‘search’. A list resulting of up to 100 individual result records are generated randomly. If specific search criteria entered will result in a more than 100 matches, utilize a redefined search result and narrow down the list generated. *Fields marked * are required.*

Client Search New:

The 'Client Search New' screen finds possible matches using the required search fields. (reference figure 2-4).

Setup:

On the 'Client Search New' screen.

1. Enter required fields (without wild cards) with legal first name, last name, SSN/SID, and date of birth (DOB) (reference figure 2-4). The "Create ID" button will automatically create an SID to search for a client who may be assigned a system ID versus a SSN. System ID is created by OPUS (or can be manually done): SYSID sequence is as follows: "S" + first 5 letters of the client's first name + month, day, year (MMDDYY) of client's birth date.
2. Click the "Search" button. The search button becomes activated when information is typed into any of the boxes. If "No Results found" is displayed, the client can be added as a new client to the OPUS database (reference figure 2-4A).

The screenshot shows the OPUS Weatherization interface for the 'Client Search New' screen. The header includes the OPUS logo, 'Agency: OHCS', and navigation links like 'HOME | Log Out'. The main content area is titled 'Client Search New' and is marked as 'Active'. Below this, there is a section for 'New Client Information' with a note that fields marked with an asterisk are required. The form includes input fields for 'First Name' (containing 'JAMES'), 'Last Name' (containing 'KIRK'), and 'SSN/Sys#'. A 'DOB' field is set to '03-20-1963'. A 'Create ID' button is located next to the DOB field. A 'Search' button is highlighted with a red circle. The left sidebar contains navigation options for 'Client Search', 'Residence', 'Household', and 'Move'. The 'Client Search' option is also highlighted with a red circle.

Figure 2-4: Client Search New, no match

NOTE: OPUS utilizes several different matching algorithms to find potential duplicate clients. Please review the list first prior to entering new clients into the database.

Client New

This step is only used after determining the client is not in the system and all search attempts have been exhausted.

Setup:

On the 'Client Search New' screen.

1. Click the 'Add New Member' button (*reference figure 2-4A*). The 'Client New' screen appears (*reference figure 2-5*).

The screenshot shows the 'Client Search New' interface. At the top, it says 'OPUS Weatherization' and 'Agency: OHCS'. There are navigation links for 'Client', 'Program', 'Historical', 'Management', 'Reports', and 'Help'. A sidebar on the left has links for 'Client Search', 'Residence', 'Household', and 'Move'. The main form area has a title 'Client Search New' and a status 'Active'. Below the title is a section for 'New Client Information' with fields for 'First Name' (JAMES), 'Last Name' (KIRK), and 'DOB' (03-20-1963). There is a 'Create ID' button and a 'Search' button. Below the form is a 'Possible Matches' table with columns for 'SSN #', 'First Name', 'Last Name', and 'DOB', and a message 'No Results Found'. The 'Add New Member' button is circled in red.

Figure 2-4A: Client Search New

2. Client name, birth date, SYSID/SSN is already filled in from being entered on the 'Client Search New' screen. Complete the rest of the new client information. *Fields marked with * require responses to be selected.* There are several buttons with dropdown arrows for different choices.
 - Title; salutation if necessary.
 - Legal first name, middle name, last name. *
 - Review social security number or system identification number for accuracy. SSN Quality Code. *
This is to describe if the SSN is full or 'don't know/don't have' or 'refuse' for system identification.
 - One phone number, extension, and type.
 - Mailing Address: *
The first client created for a household, type their mailing address in provided boxes. For subsequent clients, the select from drop-down menu will display previous mailing addresses.
 - Street number, Street direction: S, N, NE, NW, etc.
 - Street name.
 - Street type: Ave, Lane, etc.
 - Unit type: Apt, Unit, PO Box, etc.
 - Enter an apt number or PO Box number.

- City or Zip Code
- Gender *
- Disabled *
- Veteran *
- Ethnicity *
- Language.
- Education.
- Homebound
- Transportation (if Homebound set to 'YES')
- Race.*
- Oregon Tribe Option (if Native American has been selected)
- Non-Cash benefits client receives *
- Does this client have any income *
(None, Yes, None-Zero Income Statement, Don't Know, Refused).
If 'None-Zero Income Statement' is selected a required 'Zero Income Comment' block appears; otherwise it is hidden.

Click the 'Save' button.

Items marked with * required responses to be selected. Other items are optional and can be left blank.



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

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

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

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

Client New Active

Client Information (Fields marked with * are required.)

Title	<input type="text"/>	First Name	<input type="text" value="JAMES"/> *	Middle	<input type="text"/>
Last Name	<input type="text" value="KIRK"/> *	Suffix	<input type="text"/>	DOB	<input type="text" value="03-20-1963"/> (mm-dd-yyyy)*
SSN/Sys#	<input type="text"/> *	SSN Quality Code	<input type="text"/>	<input type="button" value="Create ID"/>	

Phone

Primary Phone 503-555-1212 EXT Type

Mailing Address*

No.	Direction	Street Name	Type	Direction	Unit	#
<input type="text" value="1701"/>	<input type="text"/>	<input type="text" value="FEDERATION"/>	<input type="text" value="WAY"/>	<input type="text"/>	<input type="text" value="STE"/>	<input type="text" value="10F"/>

City ST Zip +4 County

Client Characteristics

Gender	<input type="text" value="MALE"/> *	Disabled	<input type="text" value="NO"/> *
Veteran	<input type="text" value="DONT KNOW"/> *	Ethnicity	<input type="text" value="REFUSED"/> *
Language	<input type="text"/>	Education	<input type="text"/>
Homebound	<input type="text"/>	Transportation?	<input type="text"/>

Race (Check all that apply)*

<input type="checkbox"/> African American	<input type="radio"/> Don't Know
<input type="checkbox"/> American Indian/Alaska Native	<input checked="" type="radio"/> Refused
<input type="checkbox"/> Asian	
<input type="checkbox"/> Native Hawaiian or Pacific Islander	
<input type="checkbox"/> White	Oregon Tribes <input type="text"/>

Non-Cash Benefits (Check all that apply)*

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

Does this client have any income? *

Zero Income Comments :

2000 characters left (spaces count)

Timeout: 0:40
Data Classification: 3

Figure 2-5: Client New screen.

Client View

The 'Client View' screen will appear after a new client record is created or edited (*reference figure 2-6*). Use this screen to review the accuracy of information entered from the 'New' or 'Edit' screens. Note: When you change the 'Does this Client have any income?' response to YES and save. The New income button appears and the 'Zero Income Comment' box disappears, Viewing the HH View screen to verify information will be covered several times throughout this manual.

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Client View Active

Select Another Client in HH: JAMES KIRK Go

Client Information

Name: JAMES KIRK SSN/SY: 3063 SSN DQC DK
 DOB: 03-30-1963 Age: 49
 Phone: * Ext: Type: CELL * Add

Mailing Address

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

Client Characteristics

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

Edit Client View Household

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Income/Employer (Setting to No, No Total Income, Don't know, or Refused will delete all income)

Does this client have any income? YES Save

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

Timeout: 16:18
 Data Classification: 3

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

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Client View Active
 Select Another Client in HH: JAMES KIRK

Client Information

Name: JAMES KIRK SSN/SY: 33063 SSN DQC DK
 DOB: 03-30-1963 Age: 49
 Phone: * Ext: Type: CELL

Mailing Address

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

Client Characteristics

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

Non-Cash Benefits

<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

Jobs

Agency	Number	Type	Status	Cost	Completion Date

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

Does this client have any income?

Zero Income Comments :

Test the comment field

2000 characters left (spaces count)

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

Timeout: 14:55
Data Classification: 3

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Figure 2-6A: Client View with Zero Income Comments Box screen



Figure 2-7: Client Search New, add new member.

Household Mail and Phone Update

To update the mailing address from the household click on the ‘Mail/Ph Update’ link located on the Left Nav Bar (reference figure 2-8A).

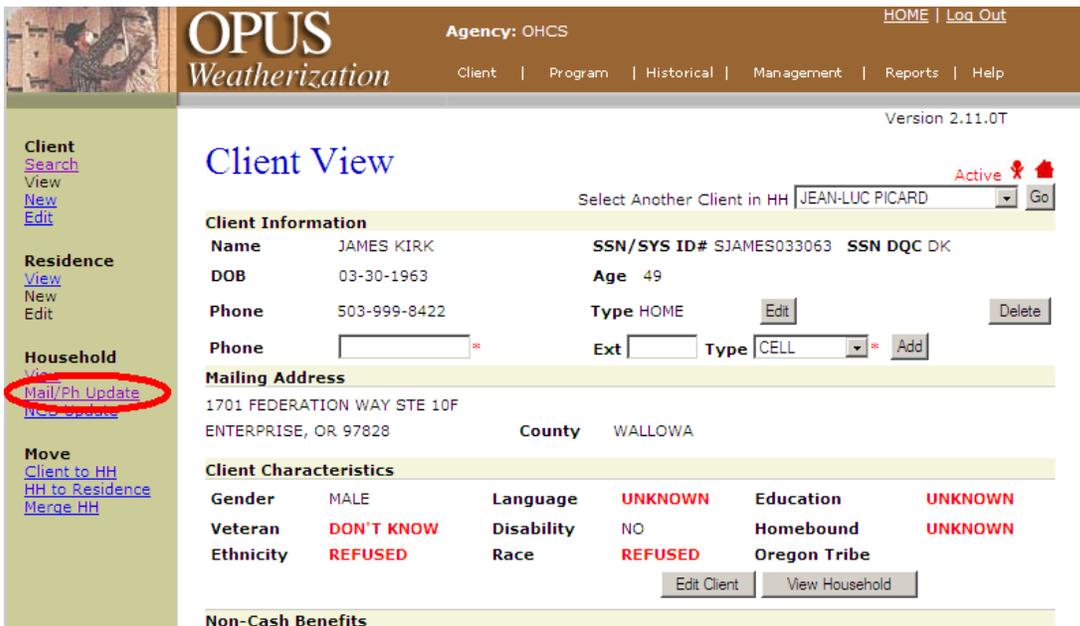


Figure 2-8A: Client View Screen

The 'Household Mail and Phone Update' Screen will now appear (*reference figure 2-8B*). You can select a new mailing address from the drop down or enter and new mailing address.

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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) *

Address	Type	Direction	Unit	#
1701 FEDERATION WAYSTE 10F - ENTERPRISE OR, 97828				
RES - 1701 FEDERATION WAYSTE 10F - ENTERPRISE OR, 97828				

City: [] State: OR 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.)

JAMES KIRK

Phone: 503-999-8422	Type: HOME	Edit	Delete
Phone: 800-555-9422	Type: CELL	Edit	Delete
Phone: 800-555-9422 * Ext: []	Type: CELL	Add	Add HH Delete HH

DR DAVID WILLIS MARCUS

Phone: 971-000-1111	Type: CELL	Edit	Delete
Phone: 800-555-9422	Type: CELL	Edit	Delete
Phone: [] * Ext: []	Type: CELL	Add	Add HH Delete HH

CAROLE MARCUS

Phone: 800-555-9422	Type: CELL	Edit	Delete
Phone: 503-888-8888 * Ext: []	Type: CELL	Add	Add HH Delete HH

JEAN-LUC PICARD

Phone: 503-555-1212	Type: HOME	Edit	Delete
Phone: 800-555-9422	Type: CELL	Edit	Delete
Phone: 503-999-9999	Type: CELL	Edit	Delete
Phone: 503-999-9999 * Ext: []	Type: CELL	Add	Add HH Delete HH

Timeout: 19:01
 Data Classification: 3
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Figure 2-8B: Household Mail and Phone Update Screen – Update HH Mailing Address

You can add or delete additional telephone numbers to/from individuals or the entire household by entering the telephone number and selecting the corresponding button (*reference figure 2-8C*)

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Household Mail and Phone Update

Active  

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

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

City ST Zip OR +4 County

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

JAMES KIRK

Phone:	<input type="text" value="503-999-8422"/>	Type:	HOME	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text" value="800-555-9422"/>	Type:	CELL	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text" value="800-555-9422"/> *	Ext:	<input type="text"/>	Type:	CELL <input type="text"/> *
				<input type="button" value="Add"/>	<input type="button" value="Add HH"/>
					<input type="button" value="Delete HH"/>

DR DAVID WILLIS MARCUS

Phone:	<input type="text" value="971-000-1111"/>	Type:	CELL	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text" value="800-555-9422"/>	Type:	CELL	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text"/> *	Ext:	<input type="text"/>	Type:	CELL <input type="text"/> *
				<input type="button" value="Add"/>	<input type="button" value="Add HH"/>
					<input type="button" value="Delete HH"/>

CAROLE MARCUS

Phone:	<input type="text" value="800-555-9422"/>	Type:	CELL	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text" value="503-888-8888"/> *	Ext:	<input type="text"/>	Type:	CELL <input type="text"/> *
				<input type="button" value="Add"/>	<input type="button" value="Add HH"/>
					<input type="button" value="Delete HH"/>

JEAN-LUC PICARD

Phone:	<input type="text" value="503-555-1212"/>	Type:	HOME	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text" value="800-555-9422"/>	Type:	CELL	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text" value="503-999-9999"/>	Type:	CELL	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Phone:	<input type="text" value="503-999-9999"/> *	Ext:	<input type="text"/>	Type:	CELL <input type="text"/> *
				<input type="button" value="Add"/>	<input type="button" value="Add HH"/>
					<input type="button" value="Delete HH"/>

Timeout: 12:12
 Data Classification: 3

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Figure 2-8C: Household Mail and Phone Update Screen – Update HH Mailing Address

Non-Cash Benefits Update

To update the non-cash benefits from the 'Client View' screen click the 'Edit' link located on the Left Nav Bar under Client or the 'Edit Client' button located in the Client Characteristics section of the Client View screen (*reference figure 2-9A*).

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Client View

Active

Select Another Client in HH: JEAN-LUC PICARD

Client Information

Name JAMES KIRK **SSN/SYS ID#** SJAMES033063 **SSN DQC** DK
DOB 03-30-1963 **Age** 49
Phone 503-999-8422 **Type** HOME
Phone 800-555-9422 **Type** CELL
Phone * **Ext** **Type** CELL

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

Client Characteristics

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TESTJOB3	BOTH	PENDING	\$3,850.00	07-23-2020

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

Does this client have any income? YES

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
UNEMPLOYMENT	STATE OF OREGON	\$250.00	\$3,000.00	07-03-2012	Y	N
<input type="button" value="New Income"/>		Total	\$250.00	\$3,000.00		

Timeout: 19:57
 Data Classification: 3

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Figure 2-9A: Client View Screen

The Client Edit screen (reference figure 2-9B) should now appear. Go to the bottom of the screen where you will find the Non-Cash Benefits section. Select and/or deselect the appropriate check boxes and select 'Save Changes' button (reference figure 2-9B).

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Client Edit

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

Title:
 First Name: JAMES * Middle:
 Last Name: KIRK * Suffix:
 DOB: 03-30-1963 (mm-dd-yyyy) * SSN/Sys#: SJAMES033063 *
 SSN Quality Code: DONT KNOW OR DONT HAVE *

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

 Homeless

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

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

Client Characteristics

Gender	MALE *	Disabled	NO *
Veteran	DONT KNOW *	Ethnicity	REFUSED *
Language	<input type="text"/>	Education	<input type="text"/>
Homebound	<input type="text"/>	Transportation?	<input type="text"/>

Race (Check all that apply) *

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

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

Timeout: 14:29
[Data Classification: 3](#)

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Figure 2-9B: Client Edit Screen

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Client View

Active

Select Another Client in HH: JEAN-LUC PICARD

Client Information

Name: JAMES KIRK SSN/SYS ID#: SJAMES033063 SSN DQC DK
 DOB: 03-30-1963 Age: 49
 Phone: 503-999-8422 Type: HOME
 Phone: 800-555-9422 Type: CELL
 Phone: * Ext: Type: CELL

Mailing Address

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

Client Characteristics

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TESTJOB3	BOTH	PENDING	\$3,850.00	07-23-2020

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

Does this client have any income? YES

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
UNEMPLOYMENT	STATE OF OREGON	\$250.00	\$3,000.00	07-03-2012	Y	N
<input type="button" value="New Income"/>		Total	\$250.00	\$3,000.00		

Timeout: 19:45
 Data Classification: 3

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HOME | Logout

Figure 2-9C: Client View Screen – Reflecting Non-Cash Benefits changes

Income & Employer

Setup:

Using the 'Client View', click on the individual household member 'SSN/SYSID' to open 'Client View' screen.

1. Click the button "New Income/Employer" (reference figure 2-10). The 'Income & Employer New' screen will appear next.

The screenshot shows the 'Client View' page for JAMES KIRK. The 'Income/Employer' section is highlighted, and the 'New Income' button is circled in red. The page includes navigation links, a sidebar with options like 'Client Search', 'Residence View', and 'Household View', and various data fields for client information, mailing address, characteristics, and benefits.

Figure 2-10: Income/Employer

2. On the Income and Employer screen, (reference figure 2-11).

Type or Select:

- * Source (such as employer's name)
- * Type of the income: i.e. SSI
- * Amount
- * Frequency
- * Verified How
- * Verified By who
- * Verified Date
- * Income received in past 30 days
- * Don't Use This record Creating Payments
- * Enter Comments as needed
- * Employer Information & address
(follow steps as required)

Click the ‘Save’ button, the ‘Client View’ screen will re-appear with the income displayed. If the client has an employer, you can enter this information by following the same steps done for income (reference figure 2-11).

The screenshot shows the OPUS Weatherization web application interface. The header includes the logo, agency name (OHCS), and navigation links. The main content area is titled 'Income/Employer New' and contains several sections: 'Income' with fields for Source/Employer Name, Type, and Amount; 'Residence' with fields for Frequency, Verified How, Verified By, and Verified Date; 'Household' with a checkbox for 'Income received in past 30 days?' and another for 'Don't Use This Record When Creating Payments'; and 'Employer Information' with fields for Phone, Address 1, Address 2, and City, State Zip. A 'Comments' section is also present. A red circle highlights the 'Save' button at the bottom right of the form. The footer contains copyright information and a 'HOME | Logout' link.

Figure 2-11: Income & Employer

Click the ‘Save’ button (reference figure 2-11) and the ‘Client View’ screen will appear next with the income added and displayed in the Income section (reference figure 2-12).

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Client View Active

Select Another Client in HH: JAMES KIRK

Client Information

Name: JAMES KIRK | SSN/SYS ID#: | SSN DQC DK
 DOB: 03-30-1963 | Age: 49
 Phone: * | Ext: | Type: CELL*

Mailing Address

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

Client Characteristics

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

Non-Cash Benefits

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

Jobs

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

Figure 2-12: Income & Employer screen.

Residence Search

A residence may exist in the database but may be linked to an old household record. If a client is located at an old address or linked to another household, go to **Section 3 - Move Client(s) to Unknown** and follow the steps. This process moves clients from an old residence record in order for you to use it for processing a new intake.

Note: If a client is “Active” in another program enrollment, possibly in another OPUS module for services, the client *cannot* be moved from the HH without being exited from the ‘other’ open enrollment. The OPUS user can search other modules he/she has access to or contact their agency’s OPUS Administrator for assistance. If the agency does not have access to another module and receives an error message “The client cannot be moved due to another open enrollment, contact OPUS Helpdesk opushelp@hcs.state.or.us”.

Residence New

Setup:

While in the ‘Client Search’ screen.

1. In the address box, type a street number and street name (with spaces between as needed).
If a street number isn’t available, use a “%” in front of the street name, such as % Stevens St.
2. If there is an apartment or unit number, use one of these formats: Apt #, Unit #, or Spc #.
3. Type a city and zip code to narrow the results to this region of the state (*reference Figure 2-12*).

Note: At any time, searching for a client by address, the percent symbol (%) is considered a ‘wild card’. Enter the percent sign followed by the street name then click ‘Search’, the system will search for any addresses close to matching what you entered.

4. When a residence is found in the database, the address, city and zip code will be displayed in the ‘Search Results’.
5. If the residence is not in the result list, you’ll see ‘No Results Found’. A new household and new residence can be created (*reference figure 2-13*). When household members have not been found in the database, click the ‘New’ link under ‘Client’ on the ‘Left Nav Bar’. The goal is to find any records from the client’s application first, and find out which household members already exist in the database before creating new records (*reference figure 2-7*).

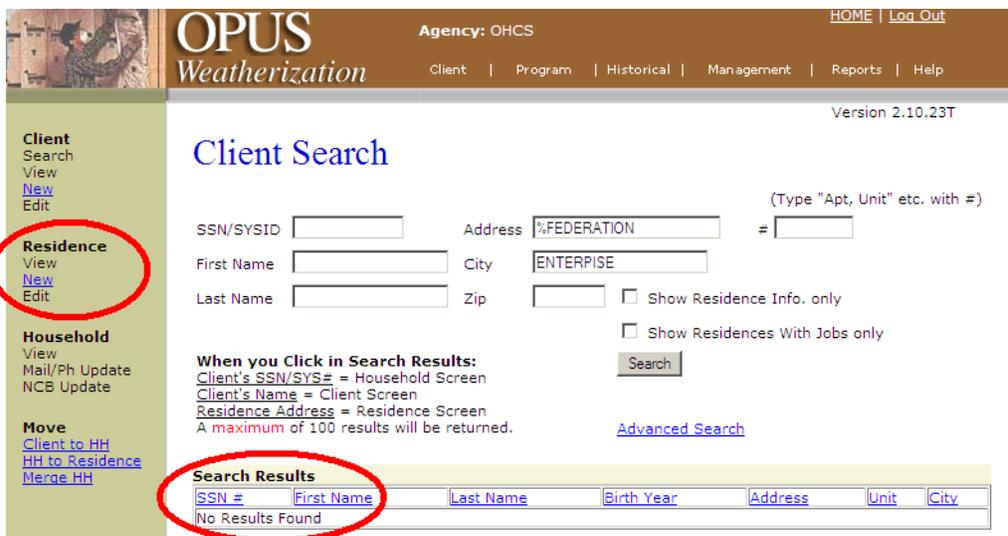


Figure 2-13: Client Search, Residence New Search – no results found.

4. When a residence is found in the database, the address, city and zip code will be displayed in the ‘Search Results’.
5. If the residence is not in the result list, you’ll see ‘No Results Found’. A new household and new residence can be created (*reference figure 2-12*). When household members have not been found in the database, click the ‘New’ link under ‘Client’ on the ‘Left Nav Bar’. The goal is to find any records from the client’s application first, and find out which household members already exist in the database before creating new records (*reference figure 2-7*).

[Verifying Data on Views](#)

In general, for all view screens, you should review to verify data entered. If information needs to be edited, the ‘Edit’ links or buttons are available to update or correct information. Most "View Screens" are for viewing purposes, the *one exception* is the ‘Household View’ screen.

Add Clients to Household

Adding clients to an existing household is easiest when at least one client and the residence have been created initially (*reference figure 2-14*).

The screenshot displays the 'Household View' screen in the OPUS Weatherization application. The header shows 'Agency: OHCS' and navigation links like 'HOME | Log Out'. The left sidebar contains a 'Client' menu with options: Search, View, New, and Edit. The main area features a 'Household View' title and an 'Active' status indicator. Below this is a table for 'HH Members' with columns for R, SSN/SYSID, Name, Age, Gen, Educ, Vet, Disb, Ethn, Race, NCB, and Income. A 'New Client' button is present. Further down are sections for 'Jobs', 'Address', 'Income Summary', 'Household Summary', and 'Phones'. The 'Household Summary' includes fields for Total Income, % of Poverty, % of OMI, Total # of Persons, and HH Type. A 'Make any changes?' button and a 'Save Changes' button are at the bottom. A 'HH Comments' text area is also visible. The footer contains copyright information and a 'Data Classification: 3' label.

Figure 2-14: Adding new client to HH

Setup:

On the 'Household View' screen:

1. On the Left Nav Bar, under 'Client', click the 'New' link. The 'Client New' screen will appear. If the client's HH member is not listed, click 'Add New Member' (*reference figure 2-15*).

Some household information will be previously entered due to the first client enrolled such as: address, home phone number. Drop-down menus are available to select from for subsequent household member(s) entered or you can manually enter new mailing addresses or phone numbers for each individual.

Add Clients to Household (cont).

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Client Search New Active  

Current Household Members

SSN/SYSID	Name	Gender	Age
	JAMES KIRK	M	49

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

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

Last Name: *

SSN/Sys#: *

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

Possible Matches

SSN #	First Name	Last Name	DOB
	DAVID J	MARC	04-11-1952
	DAVID	MORSE JR	05-12-1993
	DAVID	MARQUEZ	10-25-2001
	DAVID	MARQUEZ	01-25-2003
	DAVID	MARQUEZ	05-09-1998
	DAVID	MARQUEZ	03-04-1976
	DAVID	MARQUEZ	09-20-2001

Timeout: 15:00
Data Classification: 3

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Figure 2-15: Add new HH member search

Add Clients to Household (cont).

OPUS Weatherization Agency: OHCS [HOME](#) | [Log Out](#)

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Client New Active

Client Information (Fields marked with * are required.)

Title: DR
 First Name: DAVID * Middle: WILLIS
 Last Name: MARCUS * Suffix:
 DOB: 04-30-1989 (mm-dd-yyyy) * SSN/Sys#: * [Create ID](#)
 SSN Quality Code: *

Phone
 Primary Phone: 503-555-1212 EXT: Type: HOME

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

No.	Direction	Street Name	Type	Direction	Unit	#

City: ST Zip: County: +4

Client Characteristics

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

Race (Check all that apply) *

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

Oregon Tribes

Non-Cash Benefits (Check all that apply) *

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

Does this client have any income? *

Save
 Timeout: 11:06
 Data Classification: 3

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[HOME](#) | [Logout](#)

Figure 2-16: HH member new

2. For each household member, enter or select from the following:
 - Salutation, if needed, First Name, and Last Name.
 - Date of birth and SSN or click the 'Create System ID' button. As stated in creating a new client, a System ID is created by OPUS: OPUS creates a SYSID as follows: "S" + first 5 letters of the clients first name + month, day and two digit year of client's birth date.

- Phone number, PH Extension,
- Select PH Type.
- Mailing Address. Select an address from the drop-down menu if the mailing address has been entered previously for another member in household, or enter a new address.
- Select gender, veteran status, language, homebound, disabled, ethnicity, education level, transportation? and race.
- Select Non-Cash Benefits received by this person.
- Does Client have any income drop-down.

Click 'Save' Button.

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Client View

Select Another Client in HH: JAMES KIRK [Go] Active [Red Icons]

Client Information

Name: DR. DAVID WILLIS MARCUS SSN/SYS ID#: SSN DQC DK
 DOB: 04-30-1989 Age: 23
 Phone: [] * Ext: [] Type: CELL * Add

Mailing Address

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

Client Characteristics

Gender: MALE Language: ENGLISH Education: PS, DOCTORATE DEGREE
 Veteran: NO Disability: YES Homebound: NO
 Ethnicity: NON-HISPANIC/NON-LATINO Race: White Oregon Tribe: []

[Edit Client] [View Household]

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date	
Income/Employer (Setting to No, No - Zero Income, Don't Know or Refused will delete all income)						
Does this client have any income? YES [Save]						
Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
SOCIAL SECURITY DISABILITY INCOME	SOCIAL SECURITY ADMINISTRATION	\$100.00	\$1,200.00	07-06-2012	Y	Y
New Income		Total		\$100.00	\$1,200.00	

Timeout: 19:54
Data Classification: 3

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Figure 2-17: HH member added view

The 'Client View' screen will appear (reference figure 2-17). If changes need to be made, click the 'Client Edit' link in the left Nav Bar, or the 'Edit Client' button. Make the necessary changes, and click 'Save Changes' button. More clients can be added to the household as necessary by repeating the same steps. If all the clients have been added to the household, proceed to the 'Household View' screen to finish the client intake process, see next section for this process.

What are the RED ICONS for?

There are two red icons that are displayed at the top of client screens (*reference figure 2-18*). The red "person" icon represents an active client record added, and the red "house" icon represents an active physical residence created for this household. Scrolling the mouse over the red person icon shows the name of the client that is being worked on and the red house icon will display the physical address for the current household

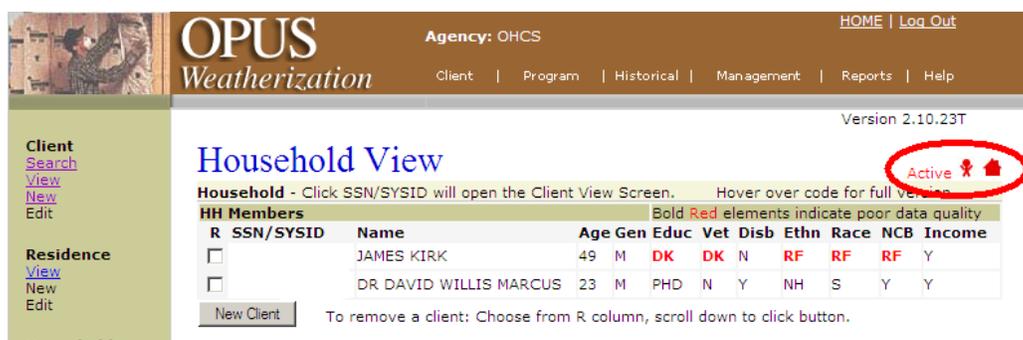


Figure 2-18: Household view Red Icons

Household View

Household view provides an overview of the household view screen and instructions for completing the final steps for a household to receive program assistance.

Setup:

On the 'Client View' screen:

Use the 'Left Nav' bar, click the 'Household View' Link, the 'Household View' screen will appear or scroll over 'Client' in the top navigational bar and HH view will appear.

(*reference figure 2-19*). This screen is organized as follows:

- HH Members information - top section
- Jobs - below client section
- Income Summary - right-side under jobs section
- Household Summary - right-side under income summary section
- Addresses - left side under jobs section
- Phone numbers - left side under address section
- HH Comments – right-side under household summary section

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Household View

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

HH Members Bold Red elements indicate poor data quality

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

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
Address					
T	U	Address	JAMES KIRK		
M		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	DR DAVID WILLIS MARCUS		
P		1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828			

Income Summary

Total Income	\$3,000.00
% of Poverty	29%
% of OMI	9%

Household Summary

Total # of Persons	2
HH Type	<input type="text" value=""/>
Household Subsidized	<input type="checkbox"/>

Phones

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

HH Comments

2000 characters left (spaces count)

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

To Remove Household: Click this button

Timeout: 6:30
 Data Classification: 3

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Figure 2-19: HH View, Jobs, Summary screen.

In the 'Jobs' section, under 'HH Members', program assistance records the household received are listed by year. This screen is mainly a "view only" screen, except for the section in the middle of the screen: 'Household Summary' section. This section needs to be completed to qualify household for assistance.