OPUS

Users Manual

Presented by:

Oregon Housing & Community Services

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Updated 06/01/2007

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OPUS User Manual
For Windows

For OPUS System v2.3 and above

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Notices OPUS User Manual For Windows For OPUS System v2.3 and above.

Help Us Improve this Manual

Your comments are important to us. Please contact us at:

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Introduction

Welcome to the OPUS System!
The OPUS System is a web-based centralized data system designed to meet data collection and business processing needs of Oregon Housing and Community Services (OHCS), Community Resources Division (CRD) and its partners.

The OPUS project was originally involved in replacing the former and aging Tracker system created in 1994, which supported the CRD's Energy programs such as Low Income Energy Assistance program (LIEAP), Oregon Energy Assistance (OEA) program, and Residential Energy Assistance Challenge (REACH) program. OPUS has now progressed to involve developing new applications to automate CRD's other community resource programs.

About this Manual

This manual is a hands-on instructional guide to OPUS data-entry functions. The Client Intake version covers the functions involved with client intake operations. The management version covers management-related operations.

Objectives

By working your way through this manual, you'll be able to:

- Use the required internet browser and reporting software
- Log in to OPUS and create a a new user password
- Know about the four types of OPUS screens
- Perform the steps necessary to enter new and/or update existing client data
- Complete steps necessary to qualify households for program assistance
- Managers will be able to create and customize agency data.*

System Setup

Hardware and Software Requirements
To operate the OPUS web-based system, you will need the following computer setup:

- An Intel Pentium processor or equivalent, 120+ MHz.
- Windows 95/98 or NT version 4.0 or later.
- At least 32 MB of available RAM.
- At least 20 MB of hard disk space to install software
- A color monitor capable of at least 800 X 600 resolution.
- Internet Explorer 5.5 Service
- Pack 2 - Browser Software (free)
- Adobe Acrobat Reader 5.0 + (free)
- Mouse
- Modem or Internet connection
- Keyboard

Setting monitor resolution

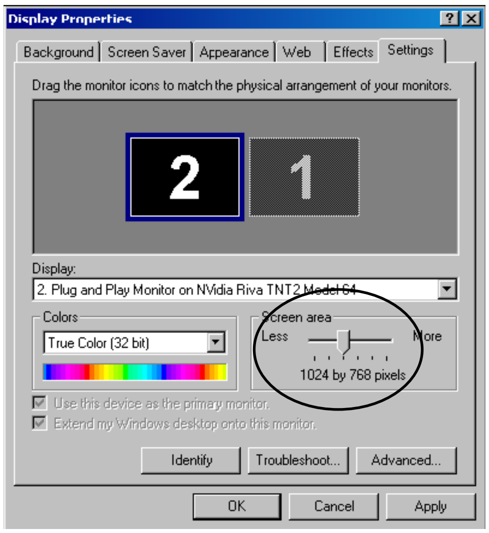
1. Right click the desktop, go to properties
2. The "Display Properties" window appears. Click the Settings tab.
3. Choose a resolution of 1024 X 768 (800 x 600 at a minimum) in the Screen Area or Desktop Area section.

If changing the monitor resolution causes system problems, you may be able to resolve the problems by restarting your computer in safe mode. Once in safe mode, you can reset the resolution to its original setting and restart your computer normally.

Monitor Resolution

The OPUS program is best viewed on a computer monitor with a screen resolution set to 1024 x 768 pixels (800 X 600 at a minimum). The higher resolution allows the screen to include more screen information and minimize the need for scrolling. The monitor resolution can be adjusted from the control panel.

Important: Always consult your computer's video card documentation before changing a monitor's settings. This ensures that both your computer video card and monitor accept the resolution chosen. Otherwise, system problems may occur. If the settings are set above a maximum setting, your computer may have operation problems.



Microsoft Internet Explorer

OPUS is specifically designed to be used in Microsoft Internet Explorer 5.5 Service Pack 2, or higher. Download the Internet Explorer from www.microsoft.com. Choose Internet Explorer 5.5 SP2 or higher. Once the download is complete, you will be prompted through a series of steps to install the software and restart your computer to complete the install process.

Adobe Acrobat Reader (for Reports)

OPUS generates several reports using the free Adobe Acrobat Reader software. Reports run as a portable document file (.pdf) format and some can only be viewed using the free Acrobat Reader software.

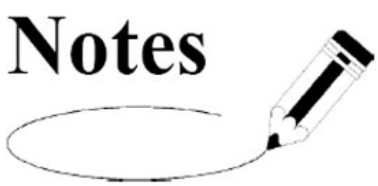
Download the latest version of Acrobat Reader, from http://www.adobe.com/products/acrobat/readermain.html.

How to Use this Manual

This manual can be used as a training tool for new users, or as a review guide.

New Users
Each section of the manual covers a broad topic or set of related topics. Sections are arranged in order of increasing proficiency. The skills you acquire in one section are used and developed for subsequent sections and tasks. For this reason, it is recommended that you work through the sections in sequence. Examples and illustrations help provide feedback and support the user's training to learn the foundation and structure of the OPUS system.

A Review Guide
Any method of instruction is only as effective as the time and effort put forth in learning it. It's recommended you spend time reviewing the sections as questions or concerns arise on how to use OPUS or how to perform a process.



Section One

Basic Operations

Internet Explorer Settings

Internet Explorer (IE) Settings

It is likely that internet browser software was installed with the default settings. The default settings need to be adjusted for web-based data entry operations. Making the following adjustments allows the application and database to communicate in ‘real-time’ as information is entered and saved to the database.

Setup:

You are viewing the computer desktop area.

1. Open Internet Explorer (IE).

2. On the Main Tool Bar, Click Tools, point to Internet Options

3. In the Internet Options Panel (middle section of the window under Temporary Internet Settings), click the Settings button *(see Figure 1-1).*

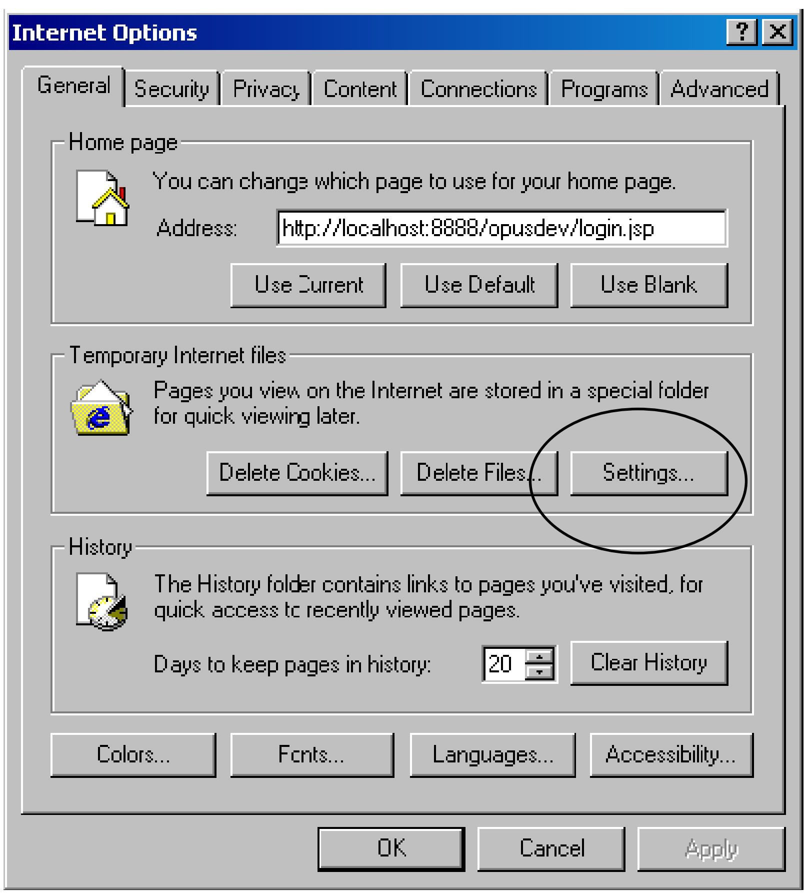


Figure 1-1: internet Options – Settings

4. On 'Settings' screen, click the option "Every Visit to the Page", then click "OK" button *(see Figure 1-2)*. You are ready to login using OPUS.

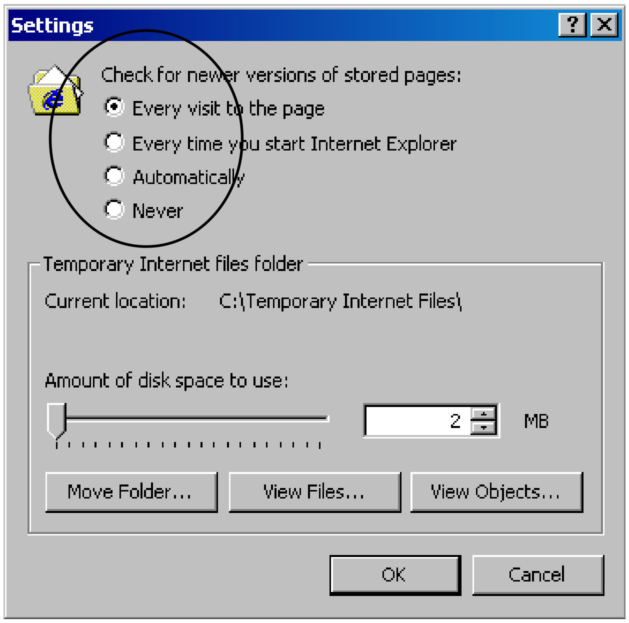


Figure 1-2: Settings Panel

Login to OPUS

Setup:

You are viewing the computer desktop area.

1. Start Internet Explorer
2. Type the address: *http://opusprod.hcs.state.or.us/*
3. A popup window will ask you to accept a security certificate, Click the 'OK' button. This is the security certificate to protect the database. **Note:** Check the box next to the phrase, "In the future, do not show this warning", so that you will not repeatedly see the message popup on each visit to OPUS.
4. On the OPUS Application screen, click the Login link *(see Figure 1-3a)*.

Figure 1-3a: Client View - Employer and Income Updated

5. On the Login screen, type the username and the password *(see Figure 1-3b)*. For new users, you will be using a temporary password given to you by your manager. You will be prompted to change it on the next screen.

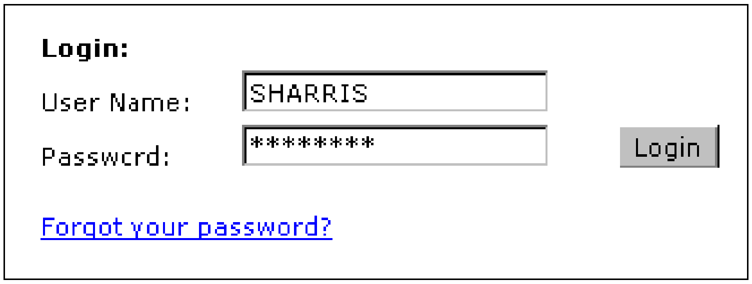


Figure 1-3b: Login Link

6. Click the Login button

7. The 'Change Password' screen will appear next. For the "Old Password", type the temporary password again (see Figure 1-4).

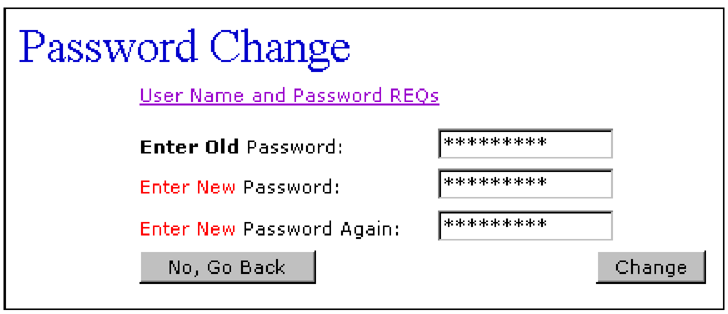


Figure 1-4: Password change screen.

8. Type a new password (this will be the permanent one to use on a regular basis). Permanent passwords need to be at least Eight (8) characters, at least one upper-case letter, at least one lower-case letter, and at least one number or special character within it (such as #, *, -). A password can <u>not</u> begin with a number.

9. In next box, re-type your new password, to confirm.

10. Click the Change button. When the user name and password are valid, click the ‘Submit’ button and you will be logged into the application. You may be given the opportunity to select the module you are approved to work in *(Figure 1-5)*.

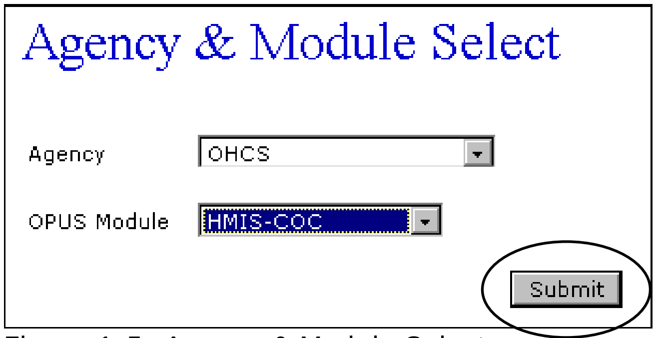


Figure 1-5: Agency & Module Select screen.

Once the module is selected and ‘Submit’ was checked you will be in the Message of the Day screen will appear.

Message of the Day

The Message of the Day screen is known as the OPUS Home Page. The screen alerts users to notices of upcoming system-upgrades, program updates, and OPUS helpdesk procedures. Click the Search Client link to begin searching records in the database.

HOME and the Log Out Screen

The ‘HOME’ and ‘Log Out’ links are located on the Main Menu *(see Figure 1-6)*. The HOME link goes to the "Message of the Day" screen.

Figure 1-6: Main Menu - Links for HOME and Log Out

Log Off Screen

To end a session, click the Log Out link. The Log Off screen will appear. To continue with the log off, click the “Yes” button. To cancel from logging off, and return to the screen you were on last, click the “No, Go Back” button *(see Figure 1-7)*. The Log Off screen has a five minute timer before logging the user out. All other OPUS screens have a 20 minute timer.

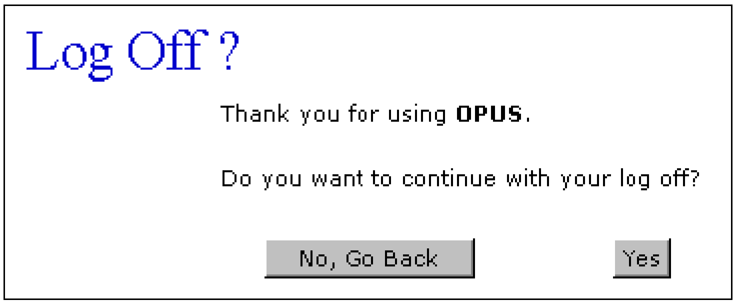


Figure 1-7: Log Off screen

Types of Screens and Buttons

There are four types of screens: Search, View, Edit and New.

Search Screen

The Search screen searches for existing database records.

View Screen

A View screen provides a view and/or review of information entered. This screen usually appears after saving data from a New or Edit screen.

Edit Screen

An Edit screen pulls existing database records into editable regions/fields to be updated and saved.

New Screen

A New screen creates new records, such as: a new client, a new residence, or a new payment.

The Save Button

On New screens, the “Save” button is used to save information to the database. On Edit screens, the “Save Changes” button is available.

Screen Timer

Each OPUS screen is programmed with a 20 minute timer *(see Figure 1-8)*. If a screen is inactive for more than 20 minutes, the Log Off screen will appear. The Log off screen has a 5 minute timer. You will need to click either No or Yes within 5 minutes. If you don't click no or yes, the session will end and you will be logged off. To continue using OPUS, you must re-log into the application. This process is a security measure programmed into the system to protect client and agency information.

Figure 1-8: Screen Timer

Note: Log out of the system if leaving your desk for any amount of time. If you have saved each screen you have completed beforehand, you can log-in and go back to where you left off from.

Screen Navigation

Main Menu, Drop Down Menus and Left Navigation Bar

OPUS screens have two navigational sections: Main Menu and Left Navigation Bar.

Main Menu

The Main Menu is the horizontal section located on the top area of the screen *(see Figure 1-9)*. The 'Active Agency' is displayed. The main menu provides top-level drop-down menus. Drop-down menus appear under: Client, Program, Fiscal, Management, Reports and Help.

Figure 1-9: Main Menu and Left Nav Bar

A drop-down menu may include sub-menus when the mouse scrolls over a topic. For each menu item, you may see a black arrow pointing towards the right. When the mouse is scrolled over a menu, the arrow, will display additional sub-menu items. In the example above, the Program menu has a drop-down menu with a ‘Go To’ item, which has a sub-level menu listing other modules. The menu includes an “Agency” item which leads the user to the Agency/Module Select screen.

Left Navigation (Nav) Bar

The Left Nav Bar is bar area has text links *(see Figure 1-9)*. Text links change on the Left Nav Bar, from screen to screen, depending on what screens have been accessed, or need to be completed through the Client Intake process.

Section Two
Client Intake - New

In this section, new household records are created. From there, a Household can be enrolled in agency programs, services and household transactions.

Client Search

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

When to use each specific Search Screen

Client Search - Use the ‘Client Search’ screen to find current records in the OPUS database.
New Client Search - Use the New Client Search screen during a Client Intake session.

Setup:
Log in and start from Message of the Day Screen.

1. Click the Search Client link. The Client Search screen will appear next. (*see Figure 2-1*).
2. With one search at a time and for each client in the household, type a client name or a system ID without dashes.
3. Click the Search Button.

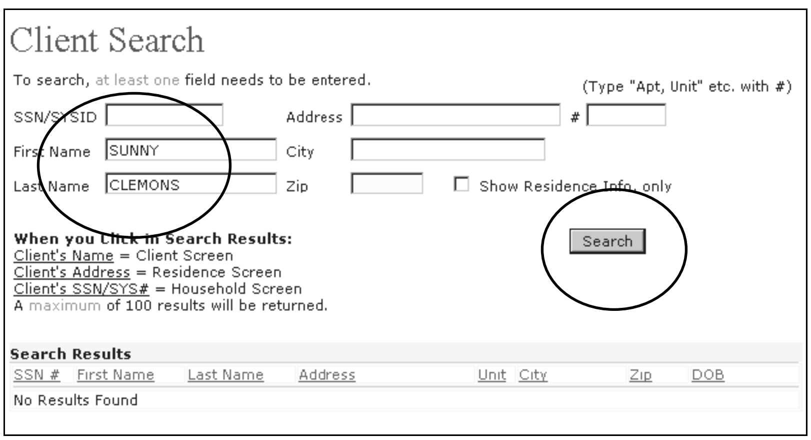


Figure 2-1: Client Search Screen

When a search is unsuccessful, a message ‘*No Results Found’* will display under the Search Results section. Repeat the search for each client in the household before adding a client to a household. When a search is successful, a client's information will display in the Search Results *(see Figure 2-2)*.

Figure 2-2: No Results Found

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

When household members have not been found in the database, click the 'New' link under Client on the Left Nav Bar *(see Figure 2-2a)*. 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.

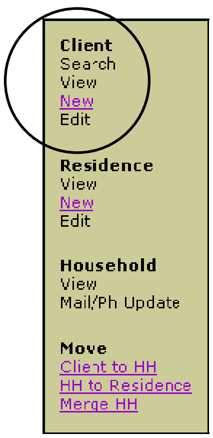


Figure 2-2a: Left Nav Bar – Client new link

Client New Search

The Client New Search screen finds possible matches using the required search fields.

Setup:

You are on the Client New Search screen.

1. Enter required fields: First Name, Last Name, SSN/Sys#, and Date of Birth (DOB) *(see Figure 2-3)*. The "Create ID" button is available to search on a system ID that a client may be using versus a SSN.

2. Click the "Search" button. Possible matches to the search criteria entered will be displayed in the Search Results which could generate up to 100 combinations of possible matches. Client New Search *(see Figure 2-3)***:** Client New Search - No Results Found.

In Figure 2-3, “No Results found” is displayed, so the Client can now be added to the OPUS database by clicking the button, “Add New Member”.

Proceed to the next section titled, Client New.

Figure 2-3: Client New Search - No Results Found.

Client New

This step is only reached after a client has been searched on the Client New Search screen.

Setup:

You are on the Client New Search screen.

1. Click the Add New Member button. (*see Figure 2-4a*). The ‘Client New’ screen appears. (*see Figure 2-4b*).

2. The name, birth date, SYSID/SSN will have already be filled in from being entered on the Client New Search screen. Fill in the rest of the screen: (*Fields marked * are required*)

- **a.** Title
- **b.** Middle Name
- **c.** The System ID button is available to create a system identification number.
- **d.** SSN Quality Code
- **e.** Phone number, Ext, and Type
- **f.** E-mail address
- **g.** Gender
- **h.** Language
- **i.** Education
- **j.** **1) -** Race
  2) - Ethnicity

3) - Nationality options (up to 3)
4) - Tribes options (up to 3)

k. 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

l. Street Number
m. Street Direction: S, N, NE, NW, etc.
n. Street Name
o. Street Direction: S, N, NE, NW, etc.
p. Street Type: Ave, Lane, etc.
q. Unit Type: Apt, Unit, PO Box, etc.
r. Enter an apt number or PO Box #
s. Select the Services and Benefits client receives
t. Click the Save Button.

The Client View screen will appear next.

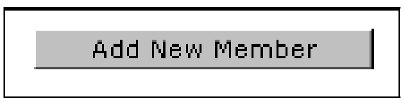


Figure 2-4a: Click the Add New member button.

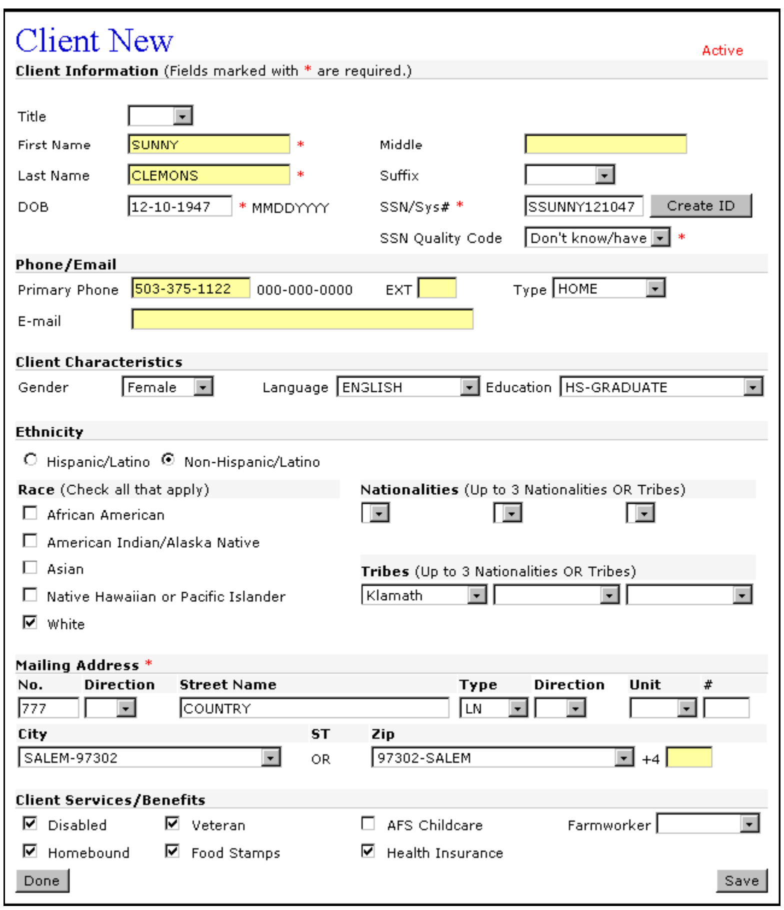


Figure 2-4b: Client New screen.

Client View

The Client View screen will appear after a new client record is create, or edited (*see Figure 2-5*). Use this screen to review the accuracy of information entered from the New or Edit screens. If the client hasn't been assessed for a program, then you can follow the steps in the following section titled, "Assessment New".

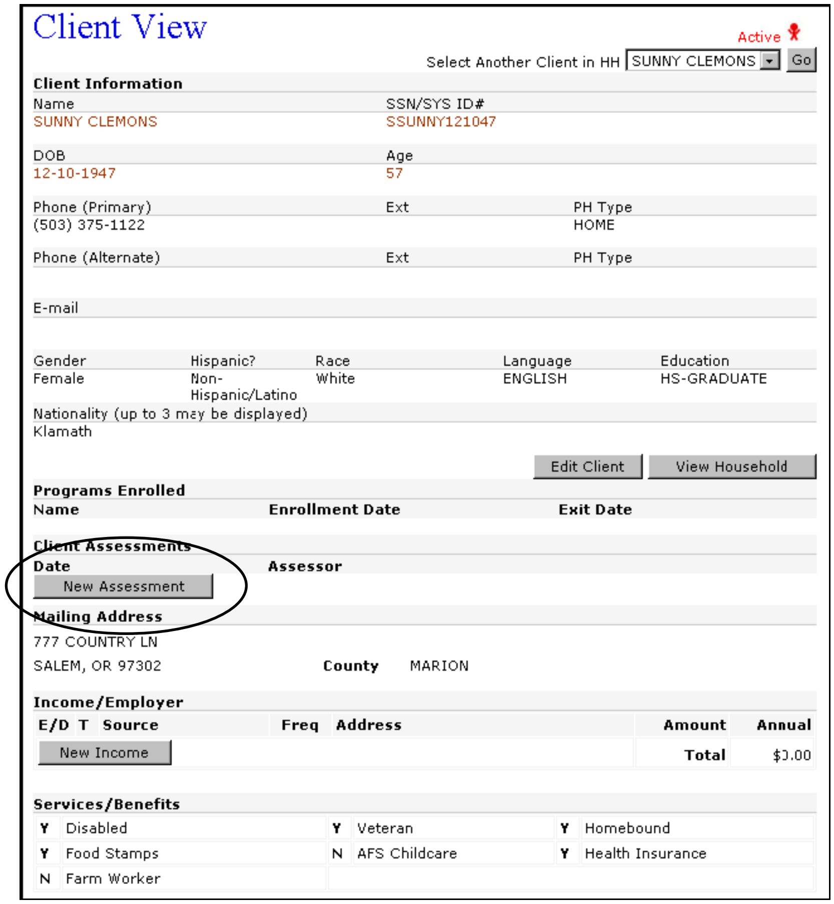


Figure 2-5: Client View screen.

Assessment New

The Assessment New screen follows the HUD Federal Register's requirements for the APR report. Follow the steps below to complete a client assessment.

Setup: Start from the Client View screen. Select or type the following (all fields marked with an * are required):

1. On the Client View screen, in the middle of the screen, find the Assessment button (*see Figure 2-5 on previous page*). The Assessment New screen will appear.
2. Select Client to be assessed
3. Enter Assessment date
4. Select any Special Needs or disabling conditions.
5. Enter employment information as needed
6. Enter Education information as needed
7. Enter Health and/or pregnancy status
8. Enter Military information
9. If the client being assessed is a child, enter school enrollment information.
10. Click the "Save" button. The Client View screen will appear next with the date of the enrollment you completed.

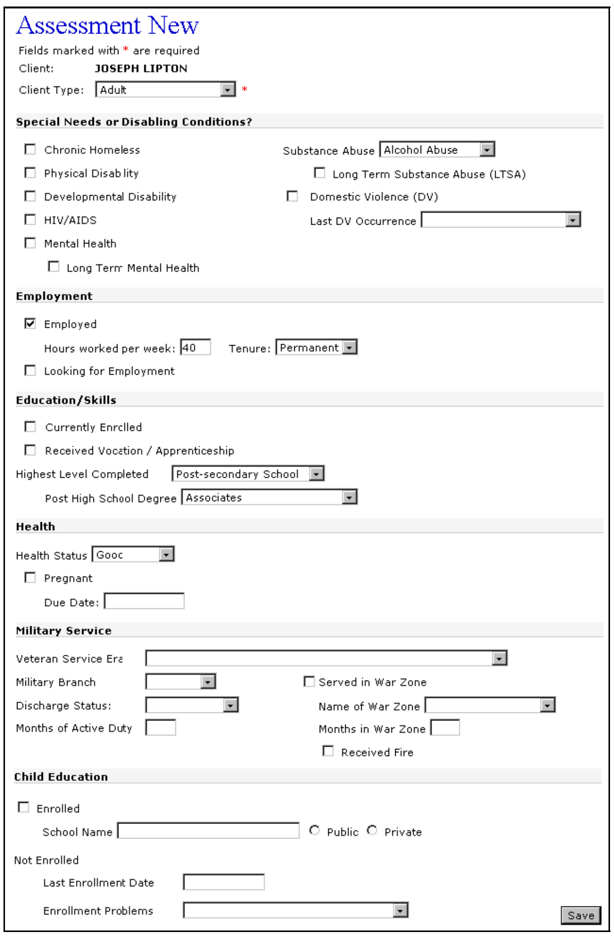


Figure 2-6: Assessment New screen.

Proceed to the next section titled, "Income & Employer".

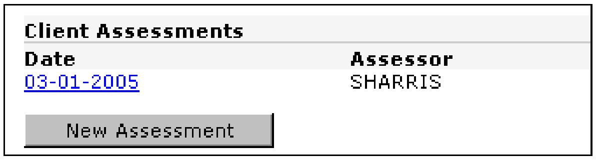


Figure 2-7: Client View - Assessment section

Income & Employer

Setup: You are on the Client View screen.

1. Click the button “New Income”, (*see Figure 2-8*). The Income & Employer screen will appear next.

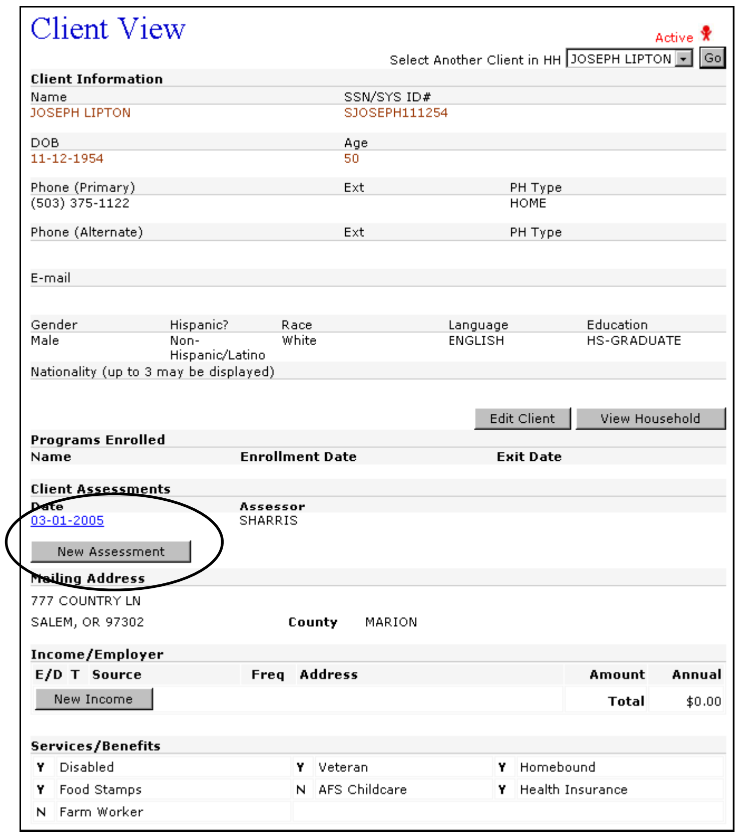


Figure 2-8: Client View screen-Joseph Lipton

2. On the Income and Employer screen, (*see Figure 2-7*).

Type or Select:

a. Source (such as employer's name)
b. Type of the income: ie. SSI
c. Cash Value (Asset Value)
d. Frequency and Amount of income
e. Verified How - Pay Stub, etc.
f. Intake By initials will populate with yours, change if needed.
g. Verified Date (mm-dd-yyyy)

h. Enter Comments as needed
i. Street Number
j. Street Direction: N, W, S, etc
k. Street Name
l. Street Type: St, Ave, Lane, etc.
m. Street Direction: N, W, S, etc
n. Street Unit Type: Apt, Bldg, etc.
o. Unit #
p. City
q. State/Prov
r. Zip + 4
s. If the client has another employer or source of income, click the "Add Another" button, or if done, click "Done".

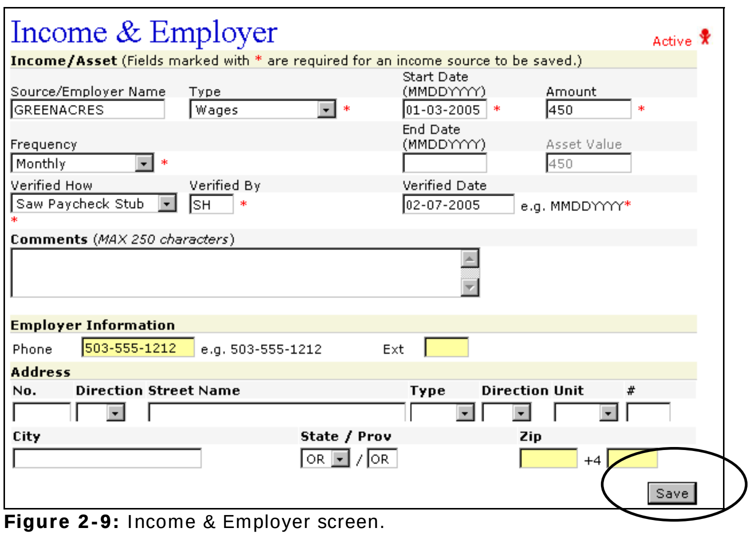


Figure 2-9: Income & Employer screen.

When the 'Save' button is clicked, the 'Client View' screen will appear next with the income added and displayed in the Income section (*see Figure 2-10*).

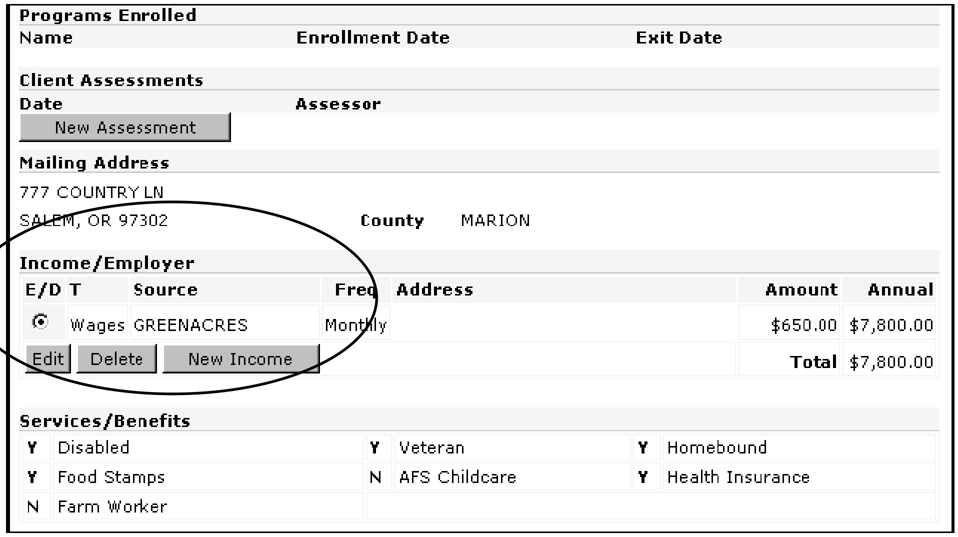


Figure 2-10: Client View screen - Income/Employer Section

Once one client's information has been entered, other household members can now be added by clicking the Client New on the Left Nav Bar.

When all the clients have been entered for the household, then you can enter residence information, as needed. Some program requirements do require a residence to be entered for a household before it's enrolled in an OPUS program.

If the residence information is needed for qualifying for program assistance, then proceed to the section titled "Residence Search".

Residence Search

A residence may exist in the database and linked to an old household. If found, follow the steps in Section 3 titled, "Move Client(s) to Unknown".

Setup: You are on the Client Search screen *(see Figure 2-11, below)*.

1. In the Address box, type a street number and street name (spaces are allowed).
2. If you have an apartment or unit number, type it in the field using these formats: Apt [space] #, Unit [space] #, or Sp [space] #.
3. Enter city and zip code.
4. Click the "Search" button. When a residence is found in the database, the address, city and zip code will be displayed in the results list. If the residence is not in the result list, you'll see a 'No Results Found' displayed. You can then begin creating a new household and a new residence.

Note: Search Results are displayed for the first 100 records matching the criteria you enter in a given search. A 'wildcard search' using a '%' in a specific field can be used as well. Proceed to the next section titled Residence New.

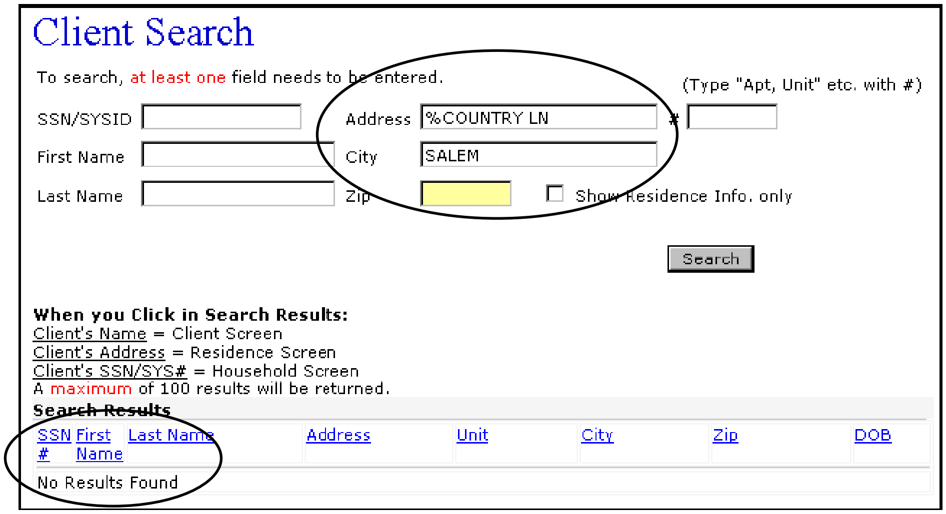


Figure 2-11: Residence Search - No Results Found.

Residence New

Setup: You need to have an 'active' client of the household searched and currently loaded. You are on a Client's View screen.

1. Click the Residence New link on the Left Nav Bar *(see Figure 2-12)*. The Residence New screen will appear.
2. Type and/or Select (*all fields marked * are required*):
a. Street Number
b. Street Direction: N, W, S, etc
c. Street Name
d. Street Type: St, Ave, Lane, etc.
b. Street Direction: N, W, S, etc
e. Street Unit Type: Apt, Bldg, etc.
f. City - Note: when city is selected, the zip code populates itself.
g. Residence Type: House, Multi-unit
h. Residence Status: heat not included, etc.
i. Number of Bedrooms
k. Home Project box
l. Click the "Save" Button to save information.

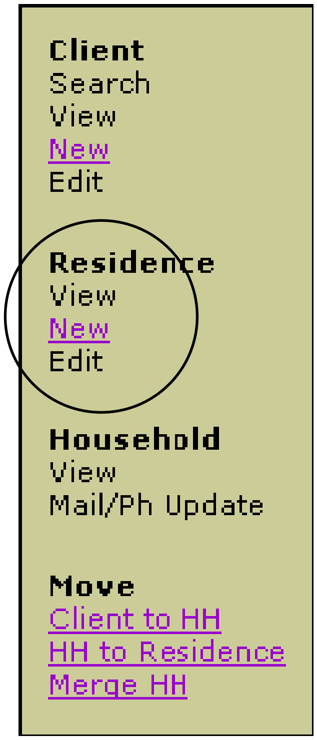


Figure 2-12: Left Nav bar - Residence New link.

Residence View screen will appear next *(see Figure 2-13)*.

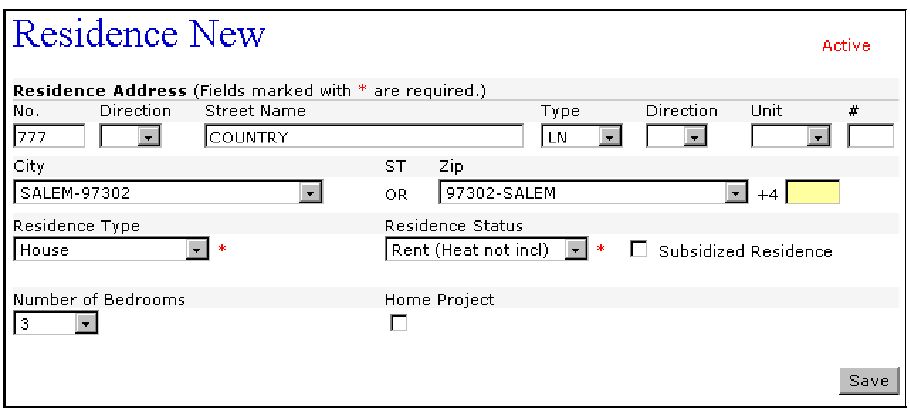


Figure 2-13: Residence New screen.

In general, for all view screens, you should review and verify data entered. If something needs to be edited, the 'Edit' links or buttons are available to update or correct information.

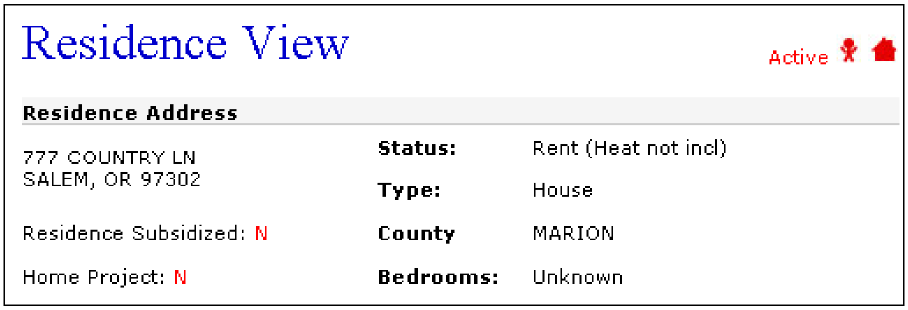


Figure 2-14: The Residence View screen.

Verifying Data on Views

Most "View Screens" are for viewing purposes, the one exception is the Household View screen; see the topic ‘Household View’ for more information.

What are the RED ICONS for?
There are two red icons that are displayed at the top of client screens (*see Figure 2-15*). The red "person" represents an active client record added, and the red "house" represents an active physical residence created for this household. Rolling your mouse over the red person gives you the name of the client you're working on and the red house will display the physical address for the current household.

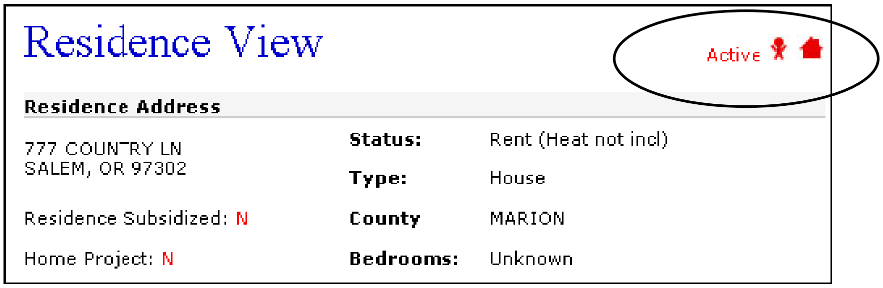


Figure 2-15: Red Icons on the Residence View screen.

Add Clients to Household

It is recommended to have at least one client and the residence initially established as "an active set', so that drop-down menus appear with options entered for the first client can be utilized.

Setup: You are on the Client Search screen.

1. Search for the existing household. Click the Client's name to see the Client View screen.

2. On Left Nav Bar, click the 'New' link, then 'Client New' link. The 'New Search' screen will appear.

Note: Whenever the 'New' Client link is clicked, you will see the 'Client New Search' screen. The search is a required step, before creating the new record.

3. On the 'Client New Search' screen, enter the client's first and last name, date of birth and SSN#. If you don't have a SSN, you can click the 'Create ID' button in order to see if the client may be using an OPUS system ID.

4. Click "Search" button (*see Figure 2-16*). Results will display for any possible matches. If the client doesn't appear in the results, click the "Add Household Member" button (*see Figure 2-16*).
If the client was found in the results, you can click the client's name, the Client Edit screen will appear.

Note: Once the first client of a household has been created, there will be an efficiency step built into the drop-down options for subsequent household members. The address and home phone number drop down menus will display previous addresses and phone numbers used before for the household. Although, if a client has a different phone or mailing address, those areas can still be entered manually.

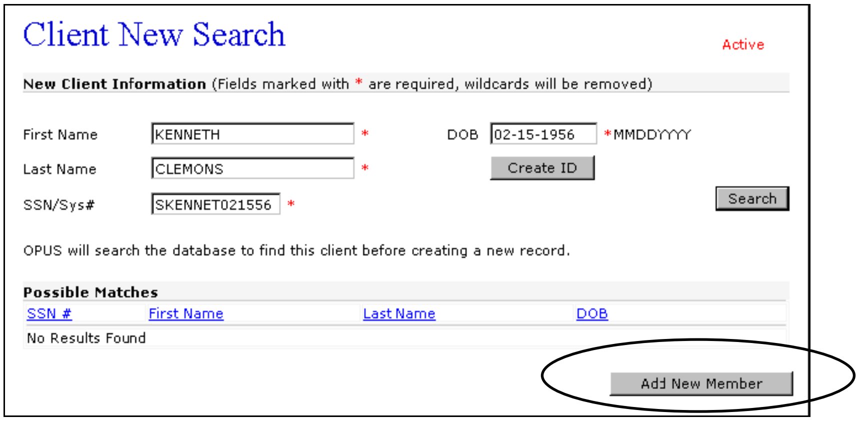


Figure 2-16: Client Edit screen.

5. For each household member, enter the following:

- **a.** Title
- **b.** First Name
- **c.** Middle Name
- **d.** Last Name
- **e.** Date of Birth
- **f.** System ID, or the System ID button is available for OPUS to create a system identification number.
- **g.** SSN Quality Code
- **h.** Phone number, Ext, and Type
- **i.** E-mail address, if needed
- **j.** Gender
- **k.** Language
- **l.** Education
- **m.** **1)** Race
  - **2)** Ethnicity
  - **3)** Nationality options (up to 3)
  - **4)** Tribes options (up to 3)
- **n.** Mailing Address (2 Options):
  - **1)** Select address from the drop-down menu if the mailing address has been entered previously
  - **2)** If a different mailing address is needed, enter it in the provided fields.
- **o.** Select the Services and Benefits for this person.
- **p.** Click “Save” Button.

The Client View screen will appear for this client. If changes are needed, click the 'Edit' link (on left Nav Bar) or the 'Edit Client' button. The Client Edit Screen will appear with the fields in edit mode. When done adding clients, proceed to the section titled "Household View".

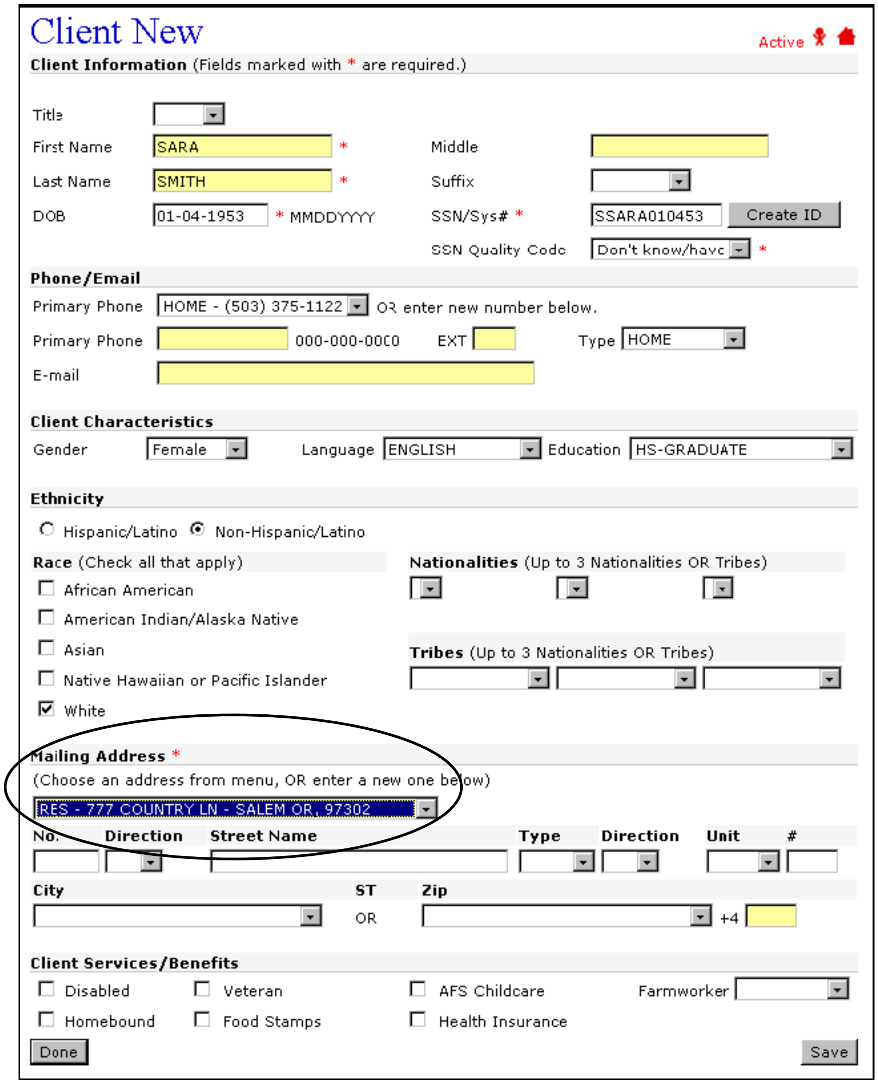


Figure 2-17: Mailing Address options on Client New.

Household View

Setup: You are on the Client View screen.

1. On the Left Nav Bar, click the Household View link, or the View ‘Household’ button. The screen will appear next (*see Figure 2-18*). This screen provides a summary of the household. It is organized as follows:

a. Client information - top section
b. Program Enrollment section
c. Household Summary - right-side under program section
d. Phone numbers - left side under address section

Programs that the household is enrolled in will be displayed under the ‘Program Enrollment’ Section. The ‘Household View’ screen is mainly a "view only" screen, except for the ‘Household Summary’ section. This section should be filled out before qualifying for program assistance. See next section titled ‘Household Summary’ for guidelines.

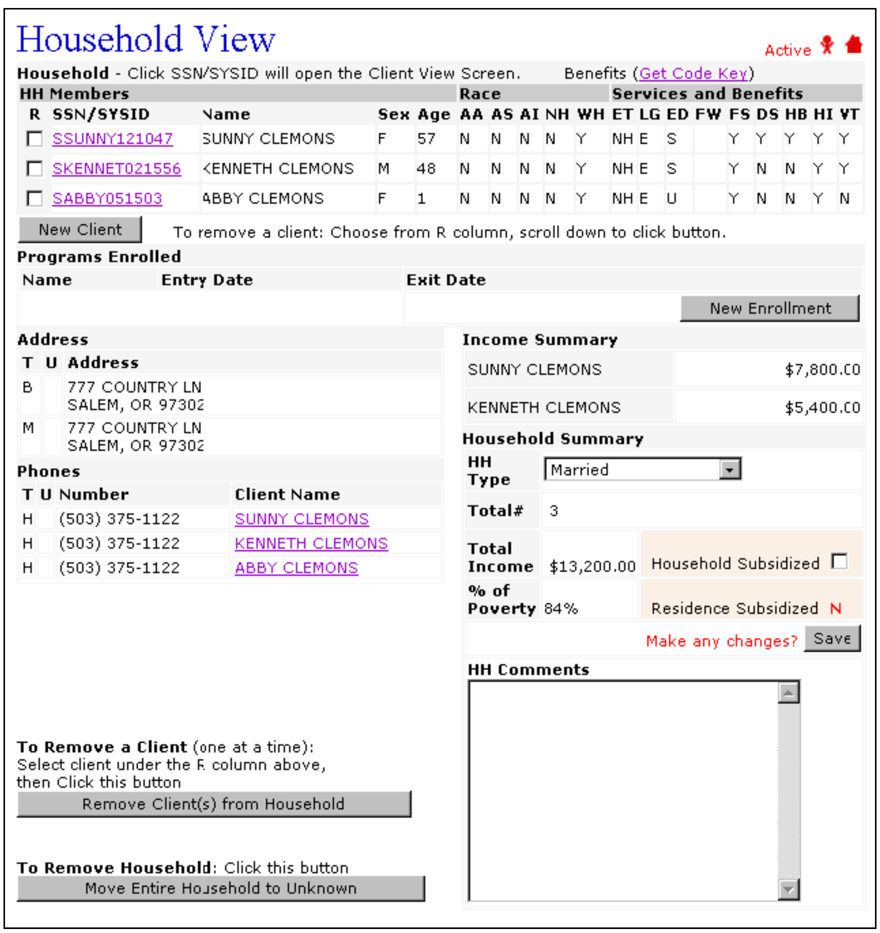


Figure 2-18: Household View

Household Summary

Setup: You are on the Household View screen (*see Figure 2-19*).

1. The Household Summary section has three fields to complete:

a. Household Type - drop-down list

b. Subsidized Status Boxes: When a household receives a housing voucher to live in an approved housing development, *OR* if the residence is being subsidized, the Residence Subsidized box should be checked automatically by the OPUS.

c. Enter Comments related to the household.

Note: Users with "view-only" access will be able to view these comments. Use discretion as needed.

2. Click the “Save” button. The Household View screen will "blink" when saving, and then remain displayed with your selections made.

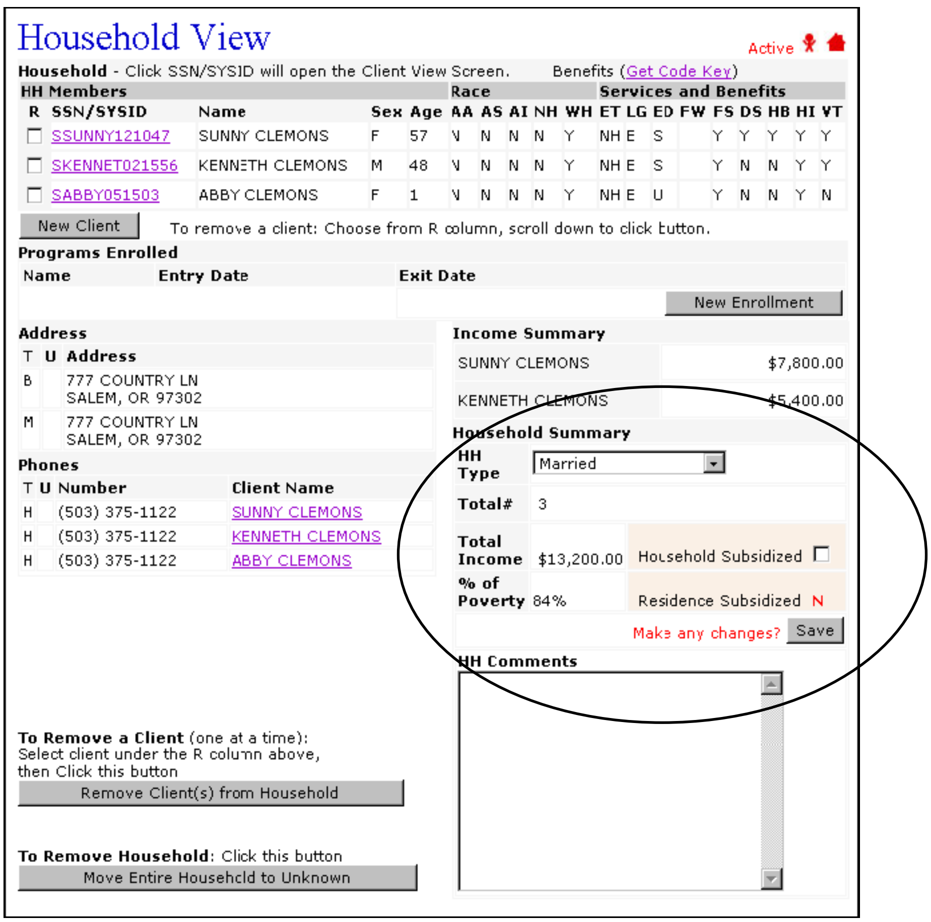


Figure 2-19: Household View - Household Summary Section.

Program Enrollment New

Once a household has been created, it can be enrolled in programs the agency has setup.

Setup: You are on the Household View screen.

1. Click the New Enrollment button (*see Figure 2-20*). The 'Program Enrollment New' screen will appear next (*see Figure 2-21a, next page*).
2. Select the Program
3. Select the 'Applicant' client first and click the Load button (*see Figure 2-21*).
4. The screen will refresh and appear with additional fields to fill in *(see Figure 2-22b, next page)*.

Complete the following:

a. Enter the Start Date
b. Select the Last Residence
c. Select the Length of stay of the last residence.
d. Enter the last Zip code
e. Verify if the income for this client is accurate. If not, you will need to revisit the Income Edit screen to update the income.

5. Click the "Save" button.

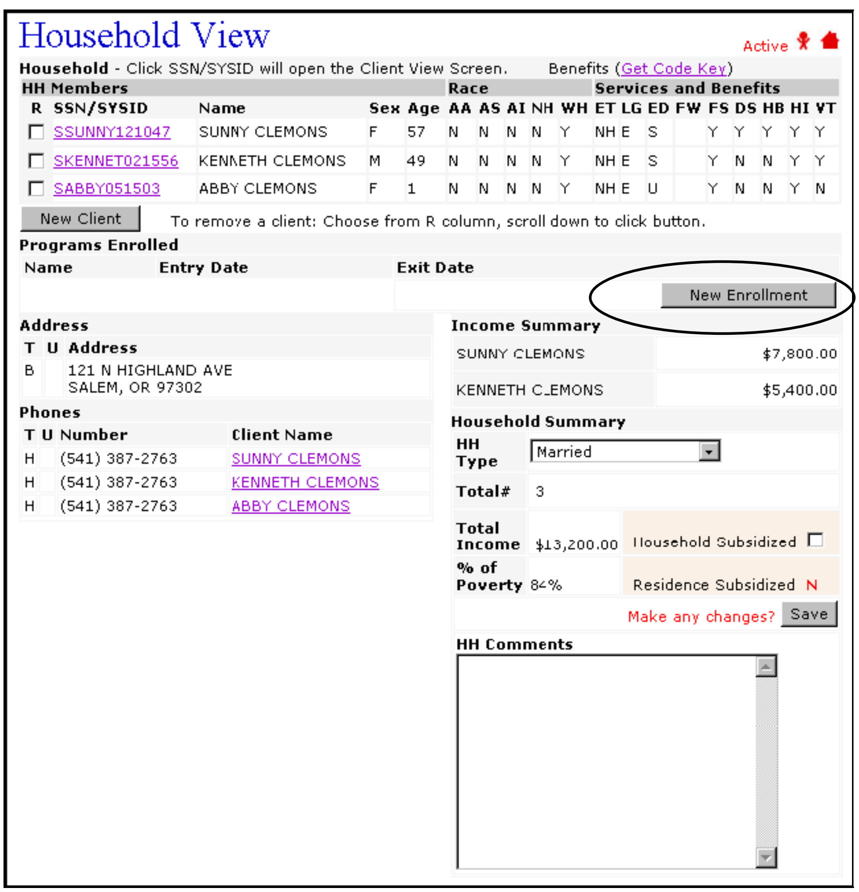


Figure 2-20: Household View

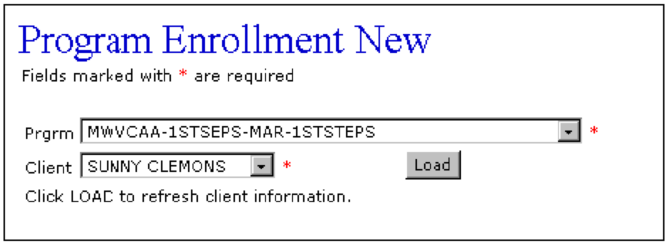


Figure 2-21a: Program Enrollment New

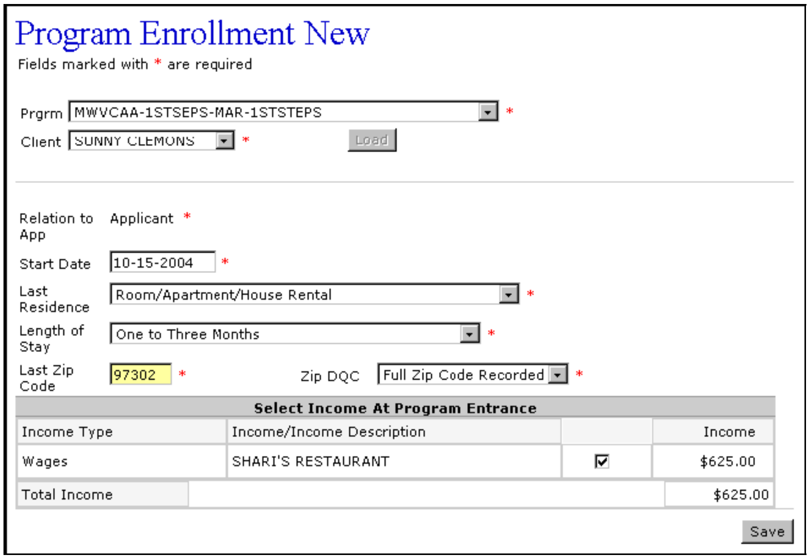


Figure 2-21b: Program Enrollment New - additional fields to complete.

The ‘Program Enrollment New’ screen will save and re-appear to allow you to select other clients in the household to enroll in the same program *(see Figure 2-22)*. As each client in the household is enrolled in the same program, their name will appear to the right.

Figure 2-22: Program Enrollment New - 2nd person in Household.

To enroll another person from the household, select the client from the drop down menu and click the ‘Load’ button. Repeat the Steps 1-5 on previous page for each additional household member enrolled. Once enrollment of the clients are complete, click the ‘Save’ button. The ‘Household Transactions Summary’ screen will appear next (*see Figure 2-24, next page*).

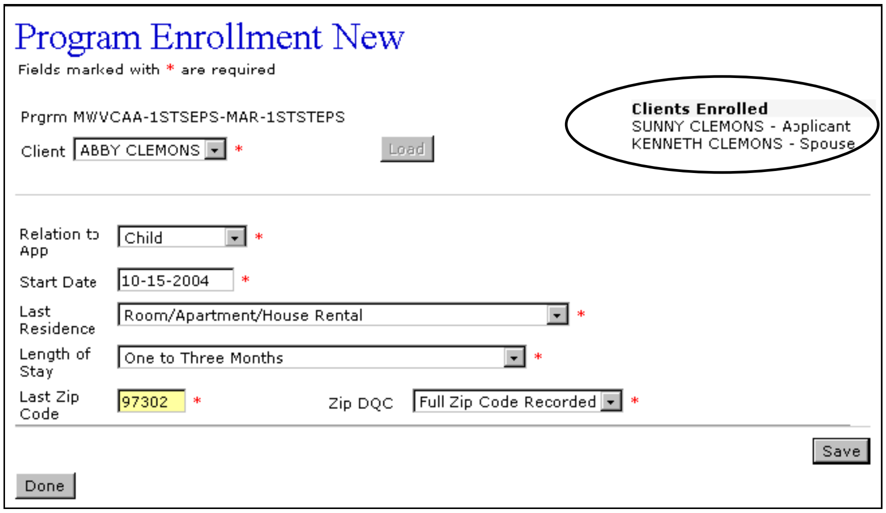


Figure 2-23: Program Enrollment New - Adding more HH members

Program Enrollment Delete

An enrollment can only be deleted if there are no transactions completed for the household to the program. If a no transactions have been done, then program enrollments can be deleted by a user with ‘Manager’ permissions. A user with a manager role will find the delete button on the ‘Household Transaction Summary’ screen under the household client area.

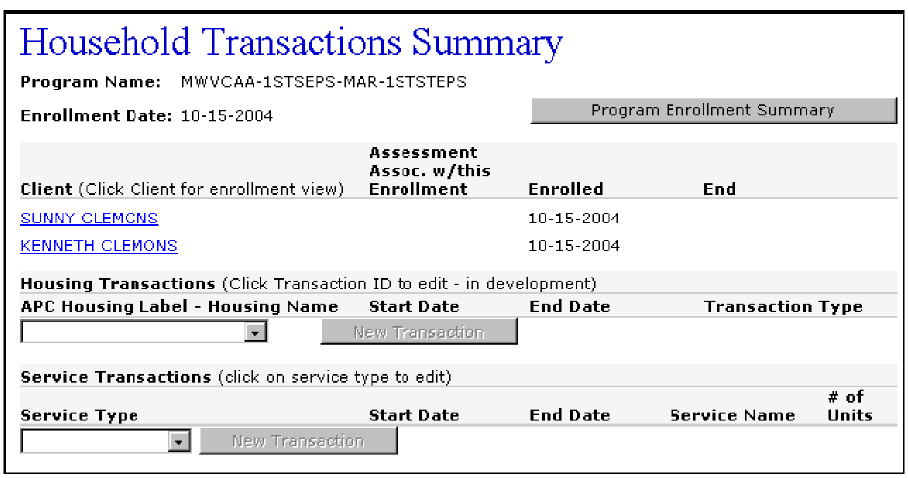


Figure 2-24: Household Transactions Summary before adding services or housing transactions.

Service Transaction New

Once a household has been enrolled into an agency program, client service programs can be accessed.

Setup: Working from the previous section, you are on the Household Transactions Summary screen (see Figure 2-25).

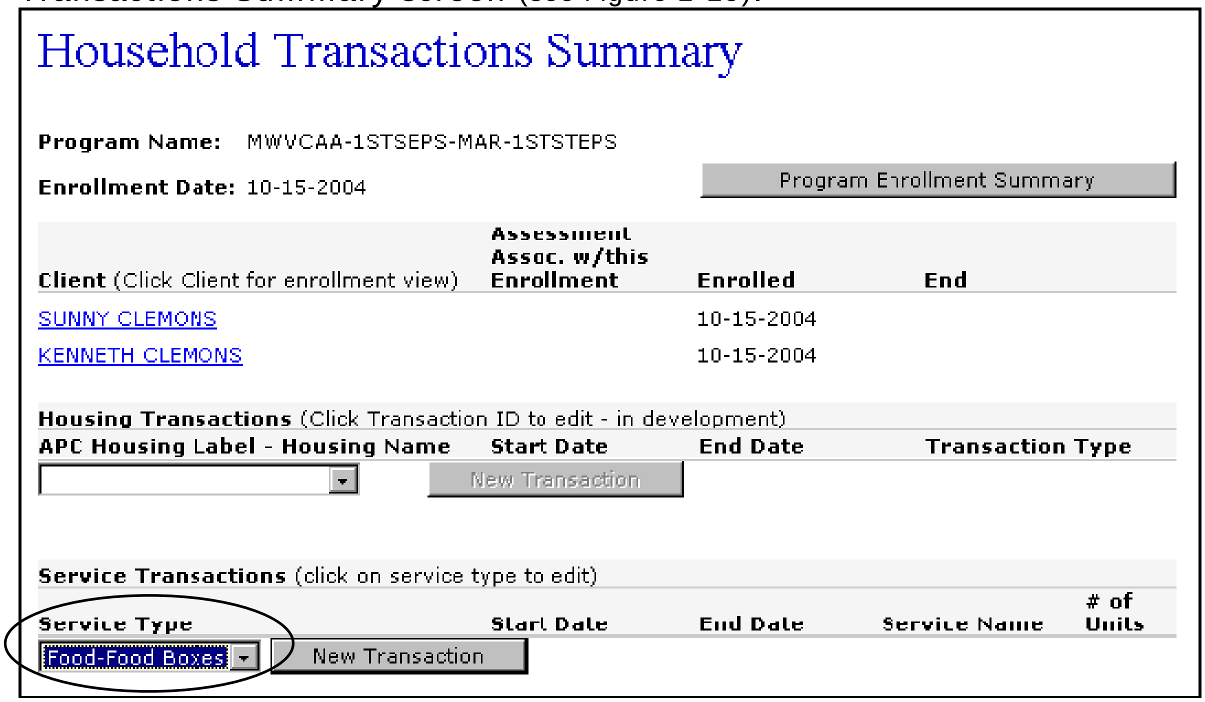


Figure 2-25: Household Transactions Summary

1. Select the service type from the dropdown menu, and click the "New Transaction" button next to it. The 'Service Transaction-New' screen will appear next (*see Figure 2-26*).

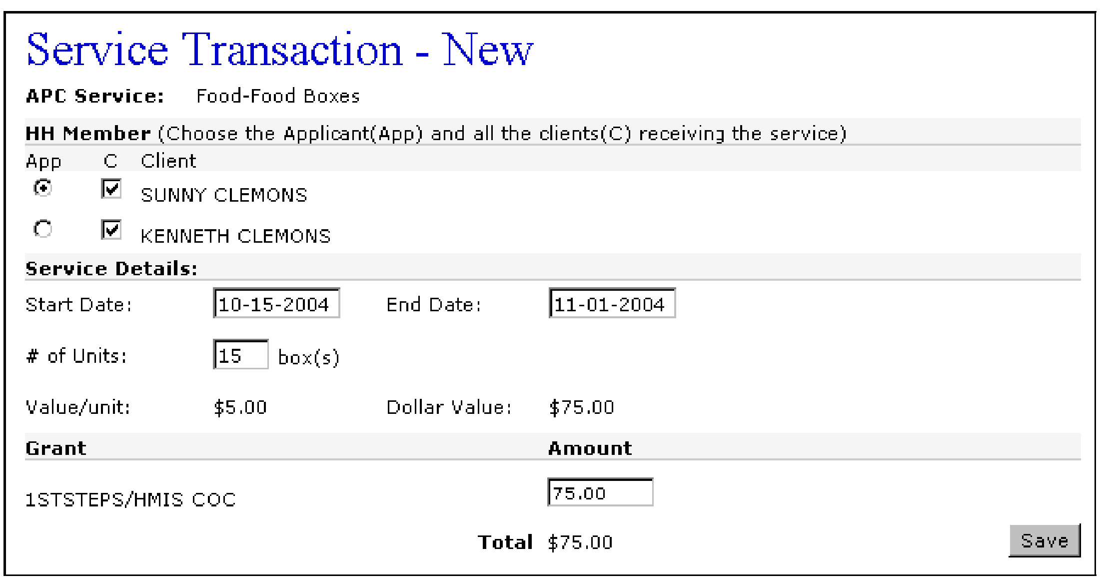


Figure 2-26: Service Transaction – New

2. Select the household members receiving the service type.
3. Enter the Start and End Dates
4. Enter the number of units of the service
5. Enter the total amount to be used from the grant.
6. Click the 'Save' button. The 'Household Transaction Summary' screen will appear next (*see Figure 2-27*). The service will display under the 'Service Transactions' section.

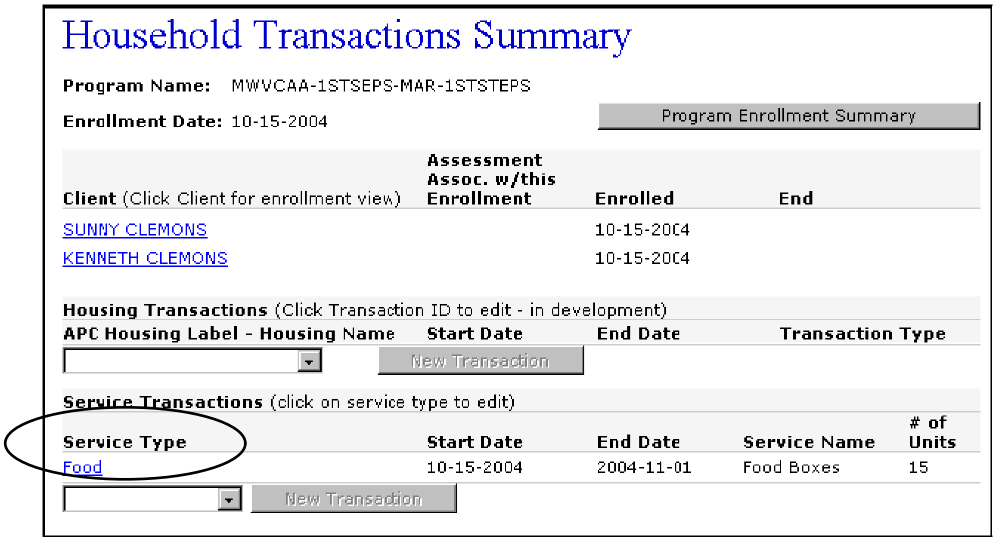


Figure 2-27: Household Transactions Summary After first service

Housing Transaction (Non-Rent Calculated)

It may be helpful to review some definitions for the section (*see Figure 2-28*).

Housing Definitions

Scattered Site - A scattered site is generally a landlord-based apartment dwelling, or residence-based housing type. This type is selected with a household needs assistance with paying rent to a landlord. The rent calculations option should be selected for this housing type.

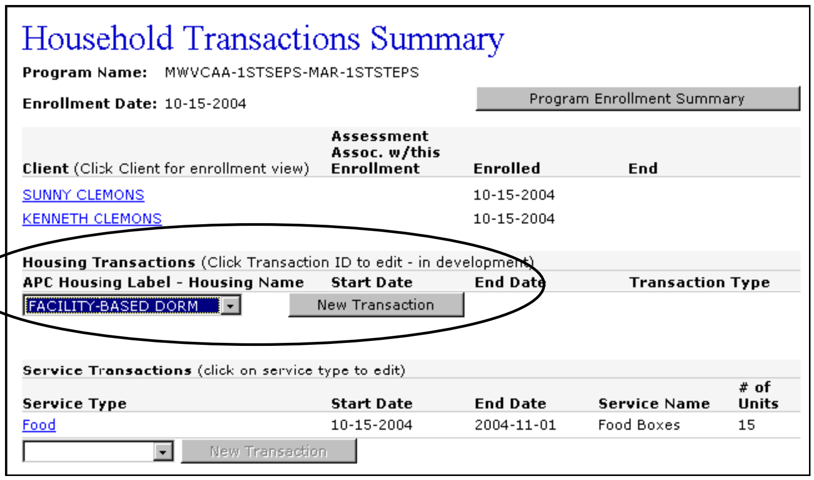
Facility based - A facility-based housing type is typically a housing of either an apartment complex or rooms which is owned by the agency. Some rent is usually charge for this type.

Figure 2-28: Household Transactions Definitions

Non-Calculated Rent - Housing Type

A non-calculated rent housing type is one that minimum rent may or may not be charged. The rent does not have to be calculated in the terms set forth in the HOME TBA or SHAP program requirements. The following example is a facility-based housing type that charges only a minimum rent and does not require a rent calculation worksheet.

Setup: Working from the previous section, you are on the Household Transactions Summary screen (*see Figure 2-29*).



Household Transactions Summary

Program Name: MWVCAA-1STSTEPS-MAR-1STSTEPS

Enrollment Date: 10-15-2004

Program Enrollment Summary

Client (Click Client for enrollment view)	Assessment Assoc. w/this Enrollment	Enrolled	End
SUNNY CLEMONS		10-15-2004	
KENNETH CLEMONS		10-15-2004	

Housing Transactions (Click Transaction ID to edit - in development)

APC Housing Label - Housing Name	Start Date	End Date	Transaction Type
FACILITY-BASED DORM	New Transaction		

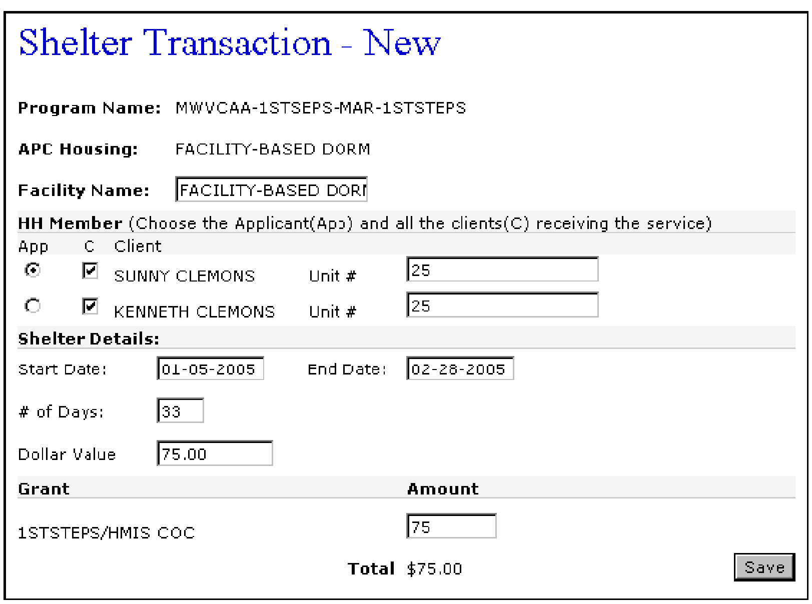
Service Transactions (click on service type to edit)

Service Type	Start Date	End Date	Service Name	# of Units
Food	10-15-2004	2004-11-01	Food Boxes	15

New Transaction

Figure 2-29: Household Transactions Summary

1. Select the facility-based housing option for this agency. Click the "New Transaction" button next to it. The "Shelter Transaction - New" screen will appear next (*see Figure 2-30*).



Shelter Transaction - New

Program Name: MWVCAA-1STSTEPS-MAR-1STSTEPS

APC Housing: FACILITY-BASED DORM

Facility Name: FACILITY-BASED DORI

HH Member (Choose the Applicant(App) and all the clients(C) receiving the service)

App	C	Client		
◉	☑	SUNNY CLEMONS	Unit #	25
○	☑	KENNETH CLEMONS	Unit #	25

Shelter Details:

Start Date: 01-05-2005 End Date: 02-28-2005

\# of Days: 33

Dollar Value 75.00

Grant	Amount
1STSTEPS/HMIS COC	75
Total	$75.00

Save

Figure 2-30: Shelter Transaction - New

2. Enter the facility's name
3. Select the clients to live in the dwelling, and enter the unit number for each client.
4. Enter the 'Start and End Dates'.
5. Enter the number of days and the total dollar value.
6. Enter the dollar amount to be subtracted from the grant.
7. Click the 'Save' button.

The Household Transaction Summary screen will appear. The transaction will appear under the Housing Transaction section (*see Figure 2-31*).

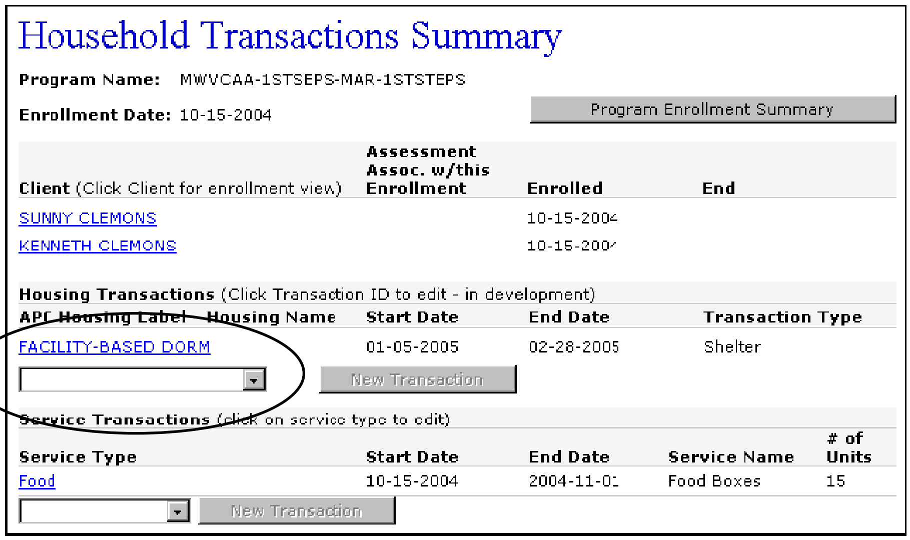


Figure 2-31: Household Transactions Summary screen

Housing Transaction (Rent Calculated)

Setup: Working from the previous section, you are on the Household Transactions Summary screen (see Figure 2-32).

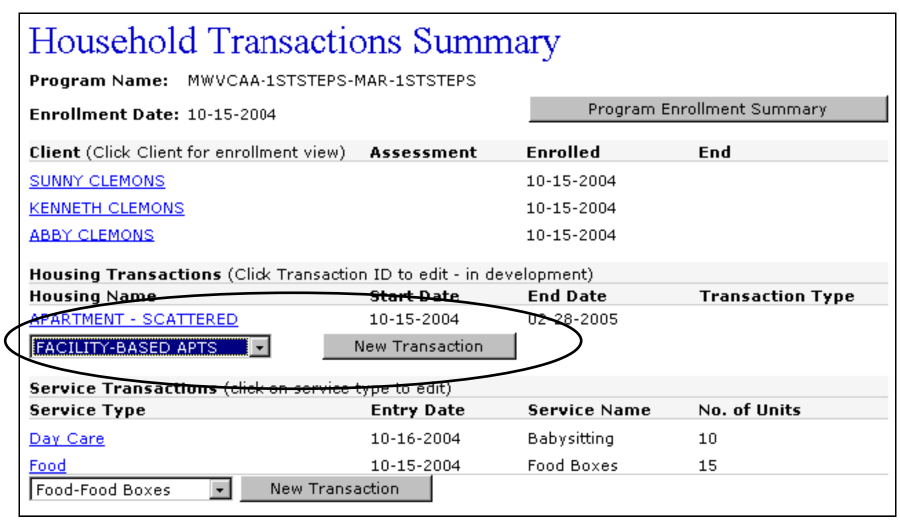
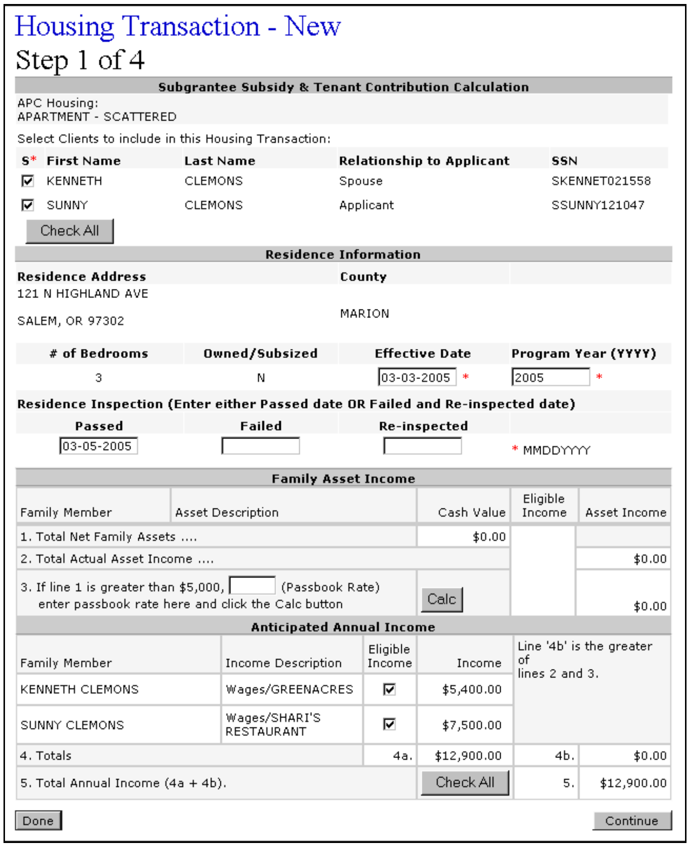


Figure 2-32: Household Transactions Summary screen

1. Under ‘Housing Transactions’, select the housing type for the scattered site housing from the dropdown menu, and click the ‘Apartment – Scattered’ button next to it. The “Housing Transaction - Step 1” screen will appear next (*see Figure 2-33*). Most scattered site housing type works through a series of rent calculations screens to arrive at a calculated rent for the client.


Housing Transaction - New

Step 1 of 4

Subgrantee Subsidy & Tenant Contribution Calculation

APC Housing:
APARTMENT - SCATTERED

Select Clients to include in this Housing Transaction:

S*	First Name	Last Name	Relationship to Applicant	SSN
☑	KENNETH	CLEMONS	Spouse	SKENNET021558
☑	SUNNY	CLEMONS	Applicant	SSUNNY121047

Check All

Residence Information

Residence Address	County
121 N HIGHLAND AVE SALEM, OR 97302	MARION

# of Bedrooms	Owned/Subsized	Effective Date	Program Year (YYYY)
3	N	03-03-2005 *	2005 *

Residence Inspection (Enter either Passed date OR Failed and Re-inspected date)

Passed	Failed	Re-inspected	
03-05-2005			* MMDDYYYY

Family Asset Income

Family Member	Asset Description	Cash Value	Eligible Income	Asset Income
1. Total Net Family Assets		$0.00		
2. Total Actual Asset Income				$0.00
3. If line 1 is greater than $5,000, (Passbook Rate) enter passbook rate here and click the Calc button		Calc		$0.00

Anticipated Annual Income

Family Member	Income Description	Eligible Income	Income	Line '4b' is the greater of lines 2 and 3.	
KENNETH CLEMONS	Wages/GREENACRES	☑	$5,400.00		
SUNNY CLEMONS	Wages/SHARI'S RESTAURANT	☑	$7,500.00		
4. Totals		4a.	$12,900.00	4b.	$0.00
5. Total Annual Income (4a + 4b).			Check All	5.	$12,900.00

Done Continue

Figure 2-33: Housing Transaction - New (Step 1)

2. On Step 1 screen, select the clients to live in the dwelling, and enter the unit number for each.
3. Enter the Effective Date and Program Year.
4. Enter the inspection dates. Note: if a site had previously failed an inspection, a re-inspected date must be entered in order to proceed through the screen.
5. Proceed through each line, of each screen Steps 1–4 (screen shots of each are provided on the proceeding pages) by using the ‘Continue’ button as you go along (see Figures 2-33, 2-34, 2-35, 2-36, 2-37, 2-38, and 2-39).

Complete each Housing Transaction for Steps 1-4, by following the guidelines in the HOMETBA and SHAP program manuals.

Step 2 - Rent Calculation

Housing Transaction - New

Step 2 of 4

Occupants

KENNETH CLEMONS

SUNNY CLEMONS

Residence Address	**County**	**Gross Annual Income**	**# of Bedrooms**
121 N HIGHLAND AVE SALEM, OR 97302	MARION	$12,900.00	3

Calculating Adjusted Income

6.	Gross Annual Income (from Line 5 of Anticipated Annual Income)	6.	$12,900.00		
7.	Enter Number of Family Members (except head or spouse) under 18, disabled or full-time students	7.	0		
8.	Line 7 multiplied by $480			8.	$0.00
9.	Annual Child Care Deduction. (Enter reasonable expenses for children age 12 and under).			9.	$ 0.00

If Family has Disability Assistance Expenses or qualifies as an elderly family, go to Line 10. Otherwise, press Continue and proceed to Line 18 on next screen titled Subgrantee Subsidy & Tenant Contribution Calculation.

10.	Enter Disability Assistance Expense	10.	$ .00		
11.	Line 6 multiplied by 0.03	11.	$387.00		
12.	Line 10 minus line 11 (will be zero if negative)	12.	$0.00		
13.	Enter amount earned by family member enabled to work as a result of Disability Assistance Expenses	13.	$ .00		
14.	Disability Assistance Allowance. The lesser of lines 12 or 13.			14.	$0.00

*** Fill in Lines 15 through 17 for **Elderly and Disabled Families Only** ***
(62 years of age for head of household or spouse)

15.	Enter Total Medical expenses	15.	$ .00		
16.	Allowable Medical expenses				
	If line 10 = 0, line 15 minus line 11.				
	If line 10 > 0 and line 12 = 0, line 15 minus (line 11-line 10)				
	If line 10 > 0 and line 12 > 0, line 15	16.	$0.00		
	$400 is added to deduction if medical expenses are allowed.	17.	0		
18.	Total of lines 8, 9, 14, 16 and 17.	18.	$0.00		
19.	**Annual Adjusted Income.** Line 6 minus 18.			19.	$12,900.00
20.	**Monthly adjusted income. Line 19 divided by 12.**			20.	$1,075.00

Done   Continue

Figure 2-34: Housing Transaction - New (Step 2)

Step 3 - Rent Calculation

Housing Transaction - New

Step 3 of 4

Tenants

KENNETH CLEMONS

SUNNY CLEMONS

Residence Address	County	Gross Annual Income	# of Bedrooms
SALEM, OR 97302	MARION	$12,900.00	3

20.	**Monthly adjusted income.**	20.	$1,075.00

Subgrantee Subsidy & Tenant Contribution Calculation

21.	Contract Rent	21.	$ 550	☐	**Max Rent 10000**
22.	Utility Allowance	22.	$ 50		
23.	Gross Rent (line 21 + line 22)			23.	$600.00
24.	Applicable Fair Market Rent (based on County and # of bedrooms)	24.	$925.00		
25.	Rent Standard (the lesser of line 23 or line 24)	25.	$600.00		
	Resident Rent Determination				
26.	30% of Adjusted Income (line 20)	26.	$322.50		
27.	10% Gross Monthly Income	27.	$107.50		
28.	Welfare Rent (where applicable)	28.	$ 0		
29.	Maximum Rental Amount Per Month: HOMETBA: Line 26 All others: Maximum amount from lines 26, 27 and 28.	29.	$322.50		
30.	Maximum Subsidy (line 25 - line 29)	30.	$277.50		
31.	Monthly Tenant Contribution (line 25 - line 30 - but not less than min rent specified in APC Housing. Includes utility allowance) (Breakdown is on lines 36, 37).	31.	$322.50		**Min Rent 75**
32.	Total Subgranteee Monthly Subsidy (Line 25-Line 31)			32.	$277.50
	33. Amount that Subgrantee pays to Utility provider (line 32-line 21), if greater than 0.	33.	0.00		
	34. Monthly Rental Subsidy (line 32-line 33)	34.	$277.50		
35.	Rent Overage (line 23 - line 24) if greater than 0.	35.	0.00		
36.	Monthly Tenant Utility Contribution. (if line 31 > line 22 then line 22, else line 31)	36.	$50.00		
37.	Total Monthly Tenant Rent Contribution	37.	$272.50		

Rental Information

38.	Tenant Utility Contribution	◉ Paid to Utility	○ Paid to Agency	38.	$50
39.	Tenant Rent Contribution	◉ Paid to Landlord	○ Paid to Agency	39.	$273
40.	Monthly Payable Through Agency				
	Amount Payable to Landlord		$278		
	Amount Payable to Utility		$0		
				40.	$278
41.	Total Subgrantee Subsidy (line 40 X #contract months)	$278 ×	5 contract months	41.	$1,668
42.	Month Prorated	NA	Prorated Amount	42.	$ 0
43.	Refundable Deposit (Security, cleaning, keys, etc.) (cannot exceed two months rent)			43.	$ 400
44.	Agency Contribution			44.	$2,068
45.	☑ Landlord Requested Last Month Rent				

Done | Continue

Figure 2-35: Housing Transaction - New (Step 3)

Step 4 - Rent Calculation

Housing Transaction - New

Step 4 of 4

Tenants

KENNETH CLEMONS

SUNNY CLEMONS

Rental Information

Monthly Tenant Contribution

Tenant Utility Contribution	Paid to Utility: **Y**	Paid to Agency: **N**	$50
Tenant Rent Contribution	Paid to Landlord: **Y**	Paid to Agency: **N**	$273

Monthly Payable Through Agency

Amount Payable to Landlord	$278	
Amount Payable to Utility	$0	
	Total	**$278**

Total Agency Contribution

Contract Months: 6	X	Max Subsidy: $278	Total:	$1,668
Contract Months: 6	X	Overage: $0	Total:	$0
Pro-rate Month: NA		Pro-rate Amount: $0		$0
Last Rent: Y		Refundable Deposit: $400		$400
			Total	**$2,068**

Monthly Tenant-Based Assistance Subsidy

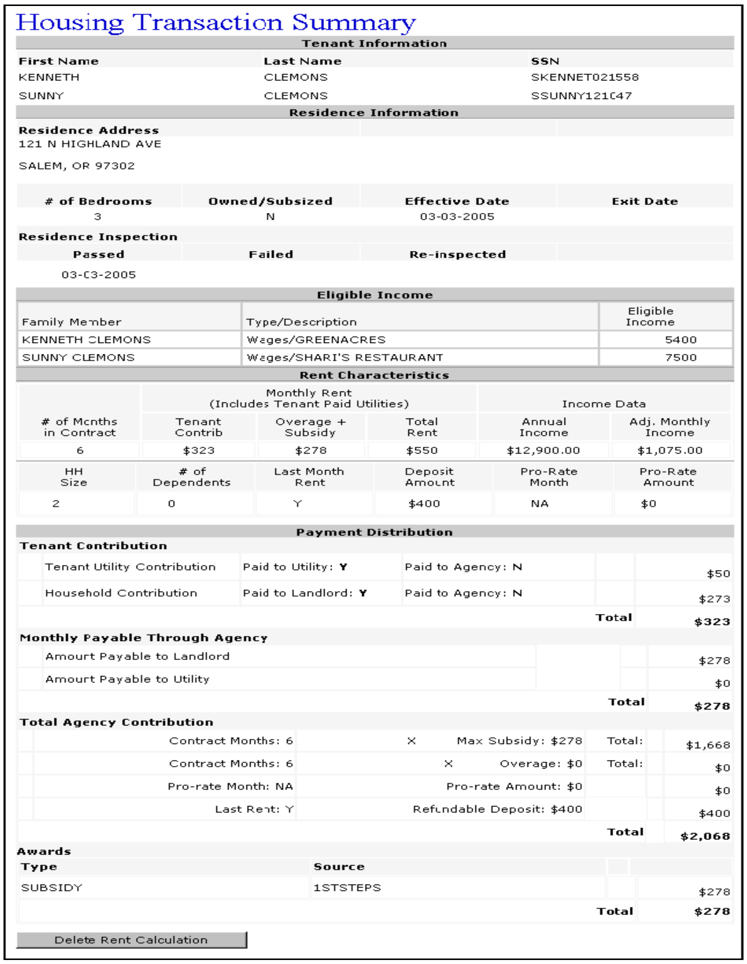
Source		**Monthly Amount**
	Maximum Subsidy	$278
1STSTEPS		278
	$	0

Continue

Figure 2-36: Housing Transaction - New (Step 4)

Housing Transaction Summary

The Housing Transaction Summary screen is a summary of what was entered on screens Step 1 through 4 *(see Figure 2-27)*. At this point, if something needs to be edited, you would need to delete this entire transaction process and start from the beginning. To delete a rent calculation transaction, click the 'Delete Transaction' button on the bottom of the screen. Otherwise, your transactions are completed for the household described in the next section titled 'Household Summary'.


Housing Transaction Summary

Tenant Information

First Name	Last Name	SSN
KENNETH	CLEMONS	SKENNET021558
SUNNY	CLEMONS	SSUNNY121C47

Residence Information

Residence Address
121 N HIGHLAND AVE
SALEM, OR 97302

# of Bedrooms	Owned/Subsized	Effective Date	Exit Date
3	N	03-03-2005	

Residence Inspection

Passed	Failed	Re-inspected
03-C3-2005		

Eligible Income

Family Member	Type/Description	Eligible Income
KENNETH CLEMONS	Wages/GREENACRES	5400
SUNNY CLEMONS	Wages/SHARI'S RESTAURANT	7500

Rent Characteristics

	Monthly Rent (Includes Tenant Paid Utilities)			Income Data	
# of Months in Contract	Tenant Contrib	Overage + Subsidy	Total Rent	Annual Income	Adj. Monthly Income
6	$323	$278	$550	$12,900.00	$1,075.00
HH Size	# of Dependents	Last Month Rent	Deposit Amount	Pro-Rate Month	Pro-Rate Amount
2	0	Y	$400	NA	$0

Payment Distribution

Tenant Contribution

Tenant Utility Contribution	Paid to Utility: **Y**	Paid to Agency: N	$50
Household Contribution	Paid to Landlord: **Y**	Paid to Agency: N	$273
		Total	**$323**

Monthly Payable Through Agency

Amount Payable to Landlord	$278
Amount Payable to Utility	$0
Total	**$278**

Total Agency Contribution

Contract Months: 6	× Max Subsidy: $278	Total:	$1,668
Contract Months: 6	× Overage: $0	Total:	$0
Pro-rate Month: NA	Pro-rate Amount: $0		$0
Last Rent: Y	Refundable Deposit: $400		$400
		Total	**$2,068**

Awards

Type	Source	
SUBSIDY	1STSTEPS	$278
	Total	**$278**

Delete Rent Calculation

Figure 2-37: Housing Transaction Summary

Household Transaction Summary

The Household Transaction Summary screen can be reached by clicking the “HH Summary” link on the Left Nav Bar (*see Figure 2-38*).

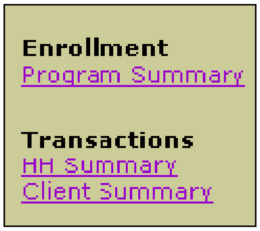


Figure 2-38: Left Nav Bar: HH Summary link

The Household Transaction Summary screen provides an overview of the transactions that a household is enrolled in for a specific program (*see Figure 2-39*). For each client listed in the household at the top of the screen, you can click each name and see the ‘Client Transaction Summary’ screen **(see next section)**.

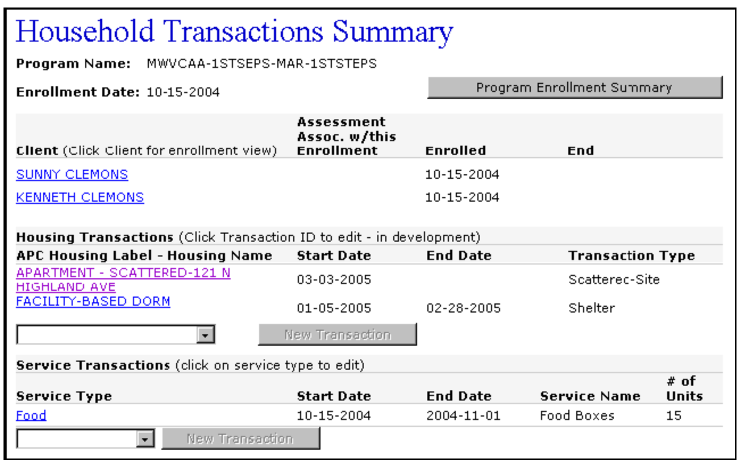


Figure 2-39: Housing Transaction Summary

Client Transactions Summary

The ‘Client Transactions Summary’ screen can be reached by clicking the “Client Summary” link on the Left Nav Bar (*see Figure 2-40*).
This screen provides an overview of the transactions that an individual client is enrolled in (*see Figure 2-41*).

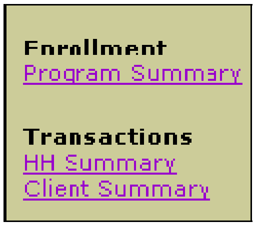


Figure 2-40: Left Nav Bar: Client Summary link

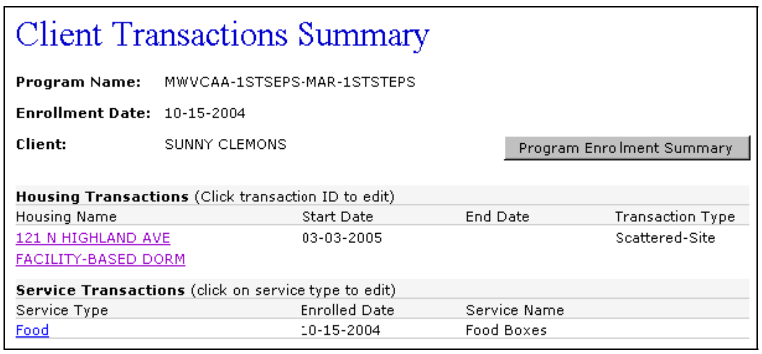


Figure 2-41: Client Transactions Summary

Program Enrollment Summary

The ‘Program Enrollment Summary’ screen can be reached by clicking the “Program Summary” link on the Left Nav Bar (*see Figure 2-42*).

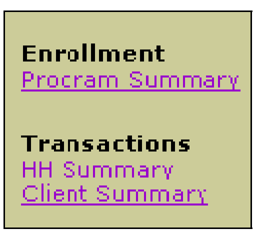


Figure 2-42: Left Nav Bar: Program Summary link

If a household member has not been assessed within the last 90 days, it’s recommended that the case manager conduct an ‘Exit’ assessment for household members. This way the agency can capture what the household composition was at the beginning and the end of their enrollment. To use an assessment for a client’s enrollment that was previously completed within the last 90 days, select it from the drop down menu and click the ‘Update’ button (*see Figure 2-43*).

If a clients name doesn't appear in the drop-down menu, an assessment was never completed. Click the 'New' button to complete an assessment and the 'Assessment' screen will appear. For guidance on completing the assessment, refer to the section in the manual titled "Assessment New".

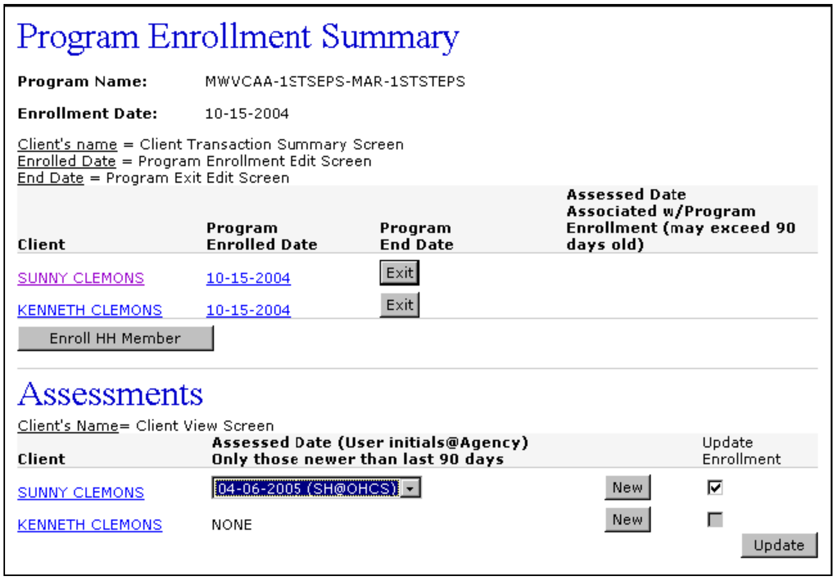


Figure 2-43: Program Enrollment Summary screen

Once a new assessment has been saved, the 'Program Enrollment Summary' screen will reappear. Select the date from the drop down menu to associate it with the client's enrollment, and click the "Update" button. The date will appear above under the client section (*see Figure 2-44*).

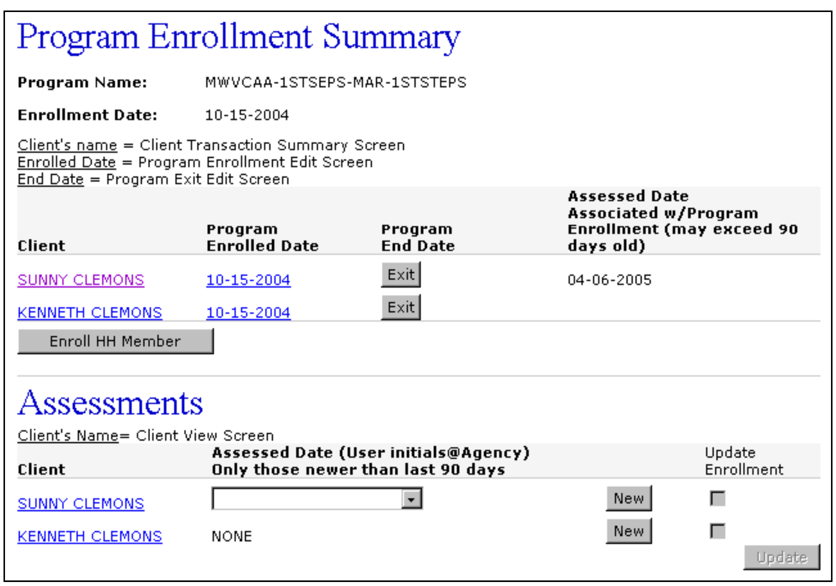


Figure 2-44: Program Enrollment Summary after associating Assessment to client.

To exit a household or an individual client from an enrollment, follow the steps in the next section titled, 'Program Enrollment Exit'.

Program Enrollment Exit

Working from the last section, you can exit clients from a program by following the steps below.

Setup: You are on the Program Enrollment Summary screen.

1. Click on an "Exit" button for a client that you want to exit from a program (*see Figure 2-46*). The Program Enrollment Exit screen will appear next (*see Figure 2-47*).

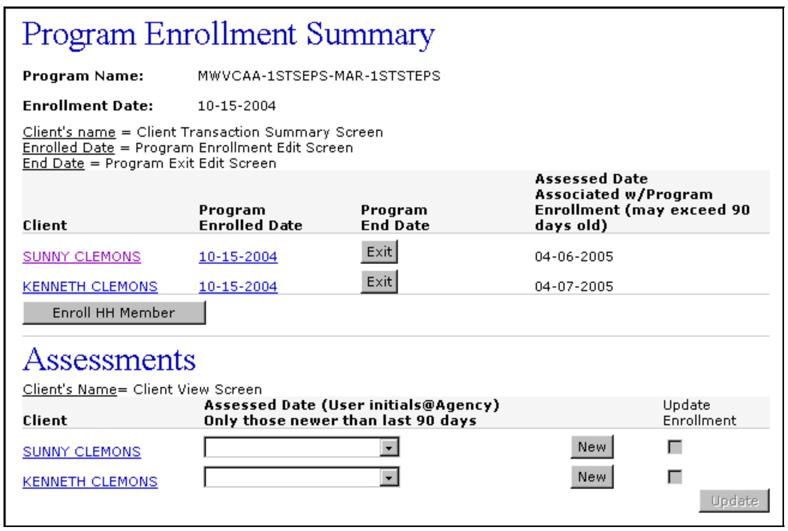


Figure 2-46: Program Enrollment Summary screen

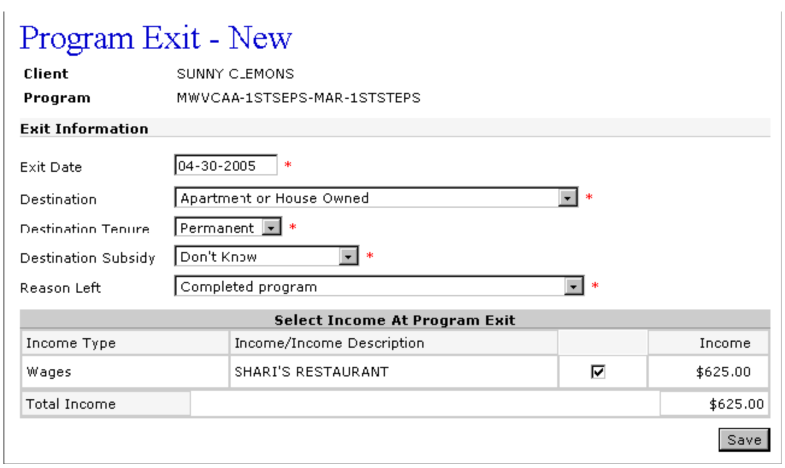


Figure 2-47: Program Enrollment Exit

2. Enter and/or select the following:

   a. Exit Date
   b. Destination
   c. Destination Tenure
   d. Destination Subsidy
   e. Reason Left

3. Click the 'Save' button. The 'Program Enrollment Summary' screen will appear next with the client displayed as exited from the program (*see Figure 2-48*). Repeat steps 1-3 above for each client that needs to be exited from the program. After each client exit, the exit date will display on the Program Enrollment Summary screen.

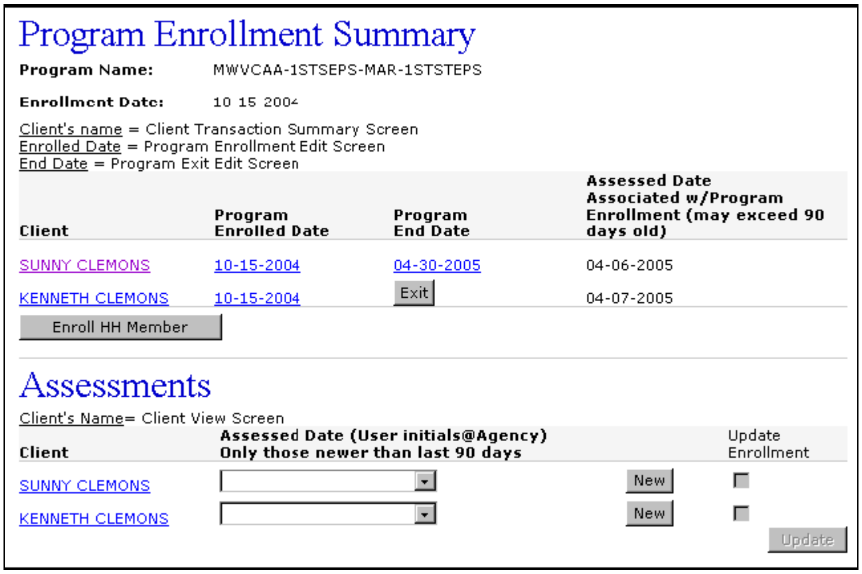


Figure 2-48: Program Enrollment Summary - After Exit

The Program Exit date will be linked (underlined) so if it needs to be edited, the user can click the link to update Exit information, see next section titled 'Program Exit – Edit'.

This completes the program enrollment process.

Program Exit - Edit

Working from the last section, you can edit the Program Exit information on this screen.

Setup: You are on the Program Enrollment Summary screen.

1. Click on 'Program End Date' link for a client that you want to edit *(see Figure 2-49)*. The 'Program Exit-Edit' screen will appear next *(see Figure 2-50)*.

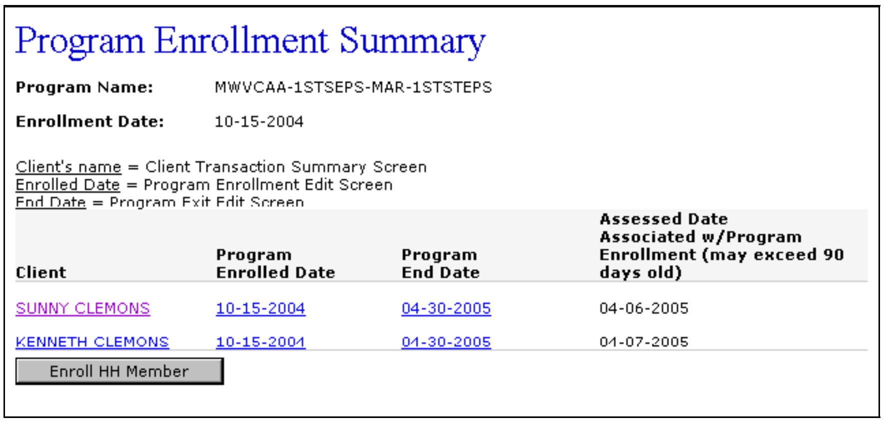


Figure 2-49: Program Enrollment Summary - Program End Date link.

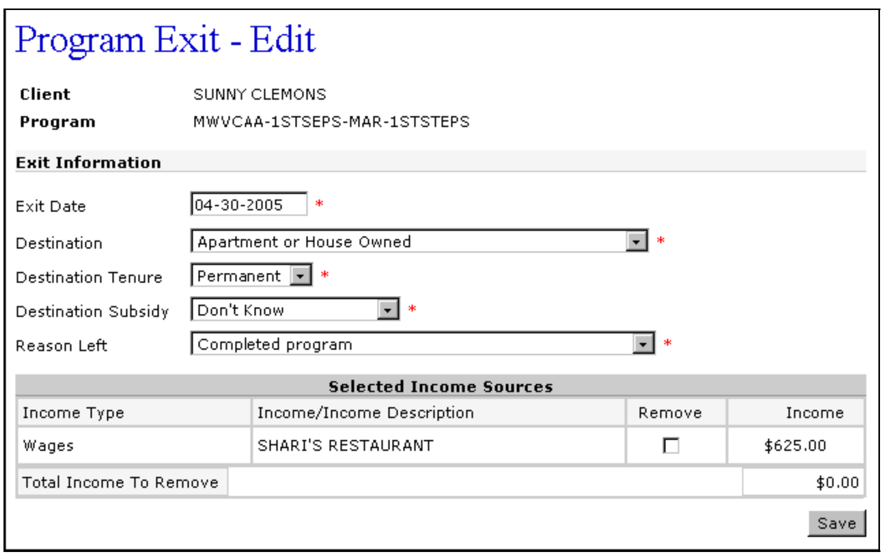


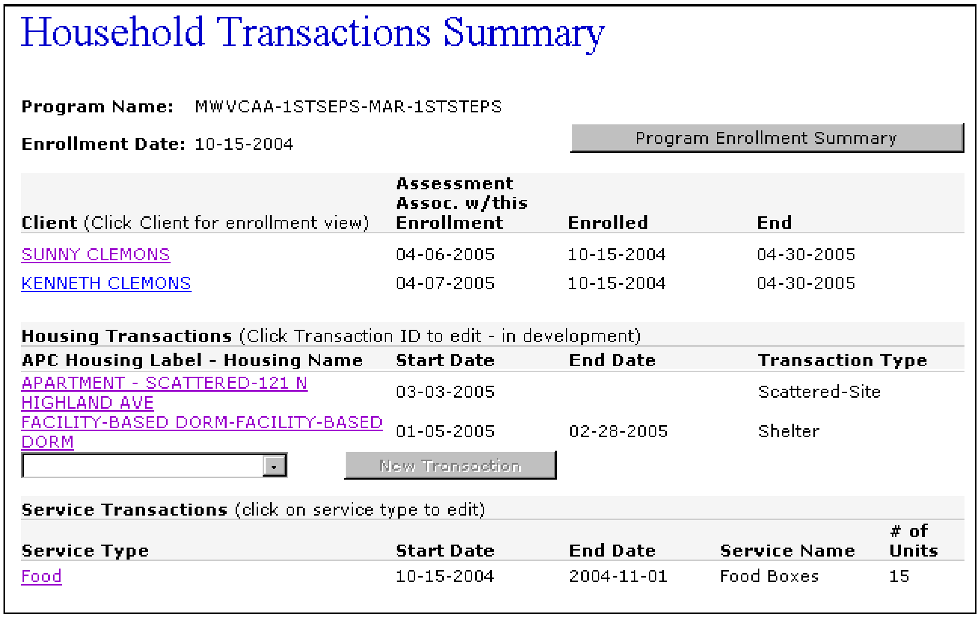
Figure 2-50: Program Exit - Edit screen.

2. Update the following as needed:

- **a.** Exit Date
- **b.** Destination
- **c.** Destination Tenure
- **d.** Destination Subsidy
- **e.** Reason Left
- **f.** If the income source needs to be removed, check the box.

3. Click the 'Save' button. The 'Program Enrollment Summary' screen will appear next.

4. Click the 'Household Transaction Summary' link on the Left Nav Bar. The screen will appear and all the entry and exit dates will be displayed for this household (*see Figure 5-51*). Click on any Client's name and find each client's enrollment screen with the dates. Also, revisit the 'Household View' or a 'Client's View' and enrollment dates will be displayed in their respective program enrollment areas.


Household Transactions Summary

Program Name: MWVCAA-1STSEPS-MAR-1STSTEPS

Enrollment Date: 10-15-2004

Program Enrollment Summary

Client (Click Client for enrollment view)	**Assessment Assoc. w/this Enrollment**	**Enrolled**	**End**
SUNNY CLEMONS	04-06-2005	10-15-2004	04-30-2005
KENNETH CLEMONS	04-07-2005	10-15-2004	04-30-2005

Housing Transactions (Click Transaction ID to edit - in development)

APC Housing Label - Housing Name	**Start Date**	**End Date**	**Transaction Type**
APARTMENT - SCATTERED-121 N HIGHLAND AVE	03-03-2005		Scattered-Site
FACILITY-BASED DORM-FACILITY-BASED DORM	01-05-2005	02-28-2005	Shelter

New Transaction

Service Transactions (click on service type to edit)

Service Type	**Start Date**	**End Date**	**Service Name**	**# of Units**
Food	10-15-2004	2004-11-01	Food Boxes	15

Figure 2-51: Household Transaction Summary screen after Exit

Section Three
Client Intake - Existing

In this section, you will learn how to update and edit existing household records in the OPUS database. 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. To edit client records, you will:

Client Intake – Existing

Client Search

Setup: You are on the Message of the Day Screen.

1. Click Search Client link
2. Search for each client in the household
3. Click the 'Search' button. When a search is successful client information will display in the Search Results section *(see Figure 3-1)*. When a search is unsuccessful, a message 'No Results Found' will display.
4. In our example, we found the client (*see Figure 3-1*). The following links go to their respective view screens.
  a. Click SSN to view the 'Household View' screen.
  b. Click on the name to view the 'Client View' *(see Figure 3-2, next page)* or click the address to view the 'Residence View' screen. Proceed to the next section titled 'Residence Search'.

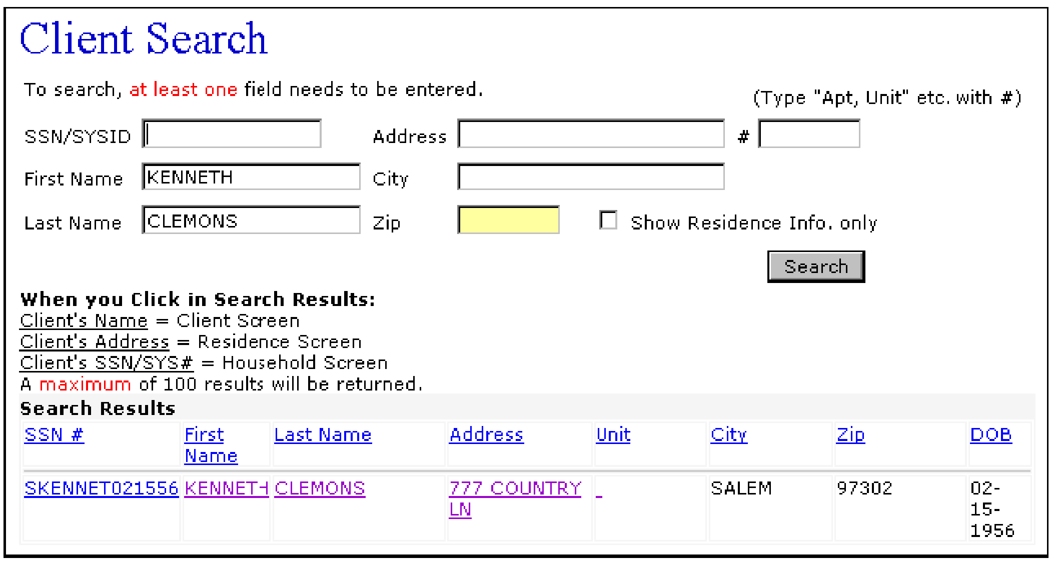


Figure 3-1: Client Search screen.

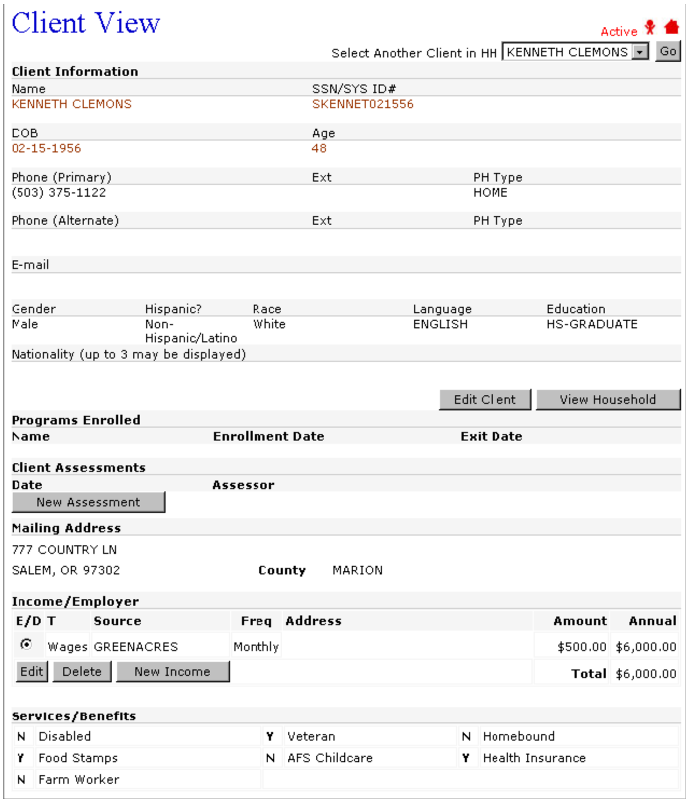


Figure 3-2: Client View screen.

"The Most Useful Screen" The Household View Screen

The client's Household View screen is useful to verify all clients within the household at-a-glance. Visiting this screen often can save time before searching each client individually. Search one client, bring up the household view, and view all household members. If all of them are displayed here, you'll know they already have a record in the database.

From the View screen *(see Figure 3-3, next page)*, it may be discovered that:

- The household has more than one client.
- The household may have moved since the last time they received assistance. Therefore, the physical and/or mailing addresses may need to be updated.
- The household may have clients in it that no longer belong there.

Because we visited the Household View screen from the initial client search, we were able to find out what needed to be updated quickly from one screen. When updating residence information, always search the address before-hand. From this search, you can determine how to proceed on to one of the following scenarios:

- If the residence address is found in the database without a household living in it, you can use it for the household. To do this, follow steps in section 'Move Household to Residence.'

- If the address is found in the database with a household in it, then you can move the "old" household out, so you can use it. Use the steps in section 'Move Household to Unknown,' and 'Move Household to Residence.'

- If the residence is not in the database, you can add it to the database, and move new household from their old residence to the new one, using steps in topic 'Move Household to a new Residence.' You are ready to proceed to the next topic titled Residence Search.

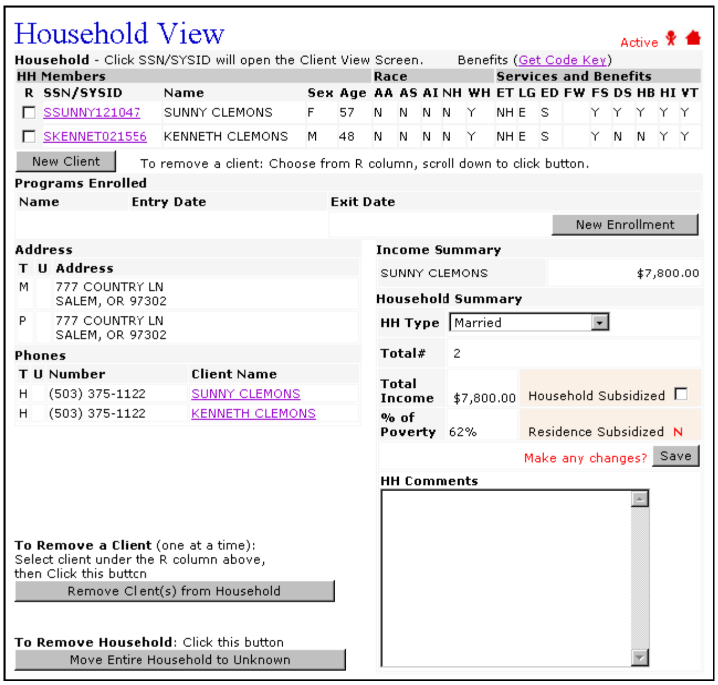


Figure 3-3: Household View.

Residence Search

It's important to find out if a residence already exists in the database.

Setup: You are on the Client Search Screen.

1. Enter a street number and street name (spaces allowed). A wildcard symbol "%" in front of the street name, such as % Stevens St is allowable.

2. Type unit number, such as an apartment number in the box.

3. Type a 'unit type' such as Apt, and unit number with a space between them.

4. Enter a city and zip code in their respective boxes.
5. If the residence address is found, the address, city and zip code will be displayed in the results.

Note: Results will display with any matches up to 100 results. A residence may exist in the database but be linked to an old household record. If this is found, you'll need to follow steps in the section titled 'Move Household to Unknown' to move the old household out of the residence, so you can use it for your household.

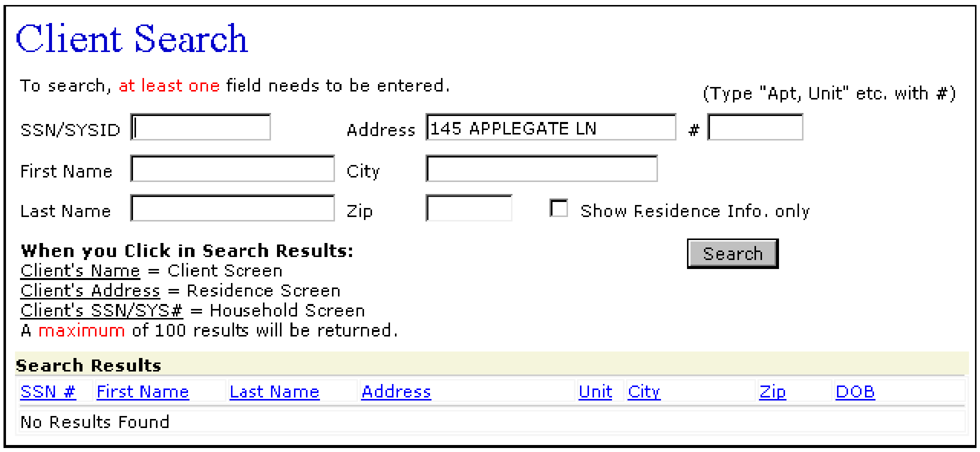


Figure 3-4: Client Search screen - Residence Search.

Client(s) - Add to Existing Household

Setup: You are on the 'Client Search' screen *(Figure 3-5)*.

1. Search the household that a client needs to be added to. Enter the client's SYSID of a household member. Click 'Search' button.
2. In the results, click the existing client's 'SSN' link to see the 'Household View'.

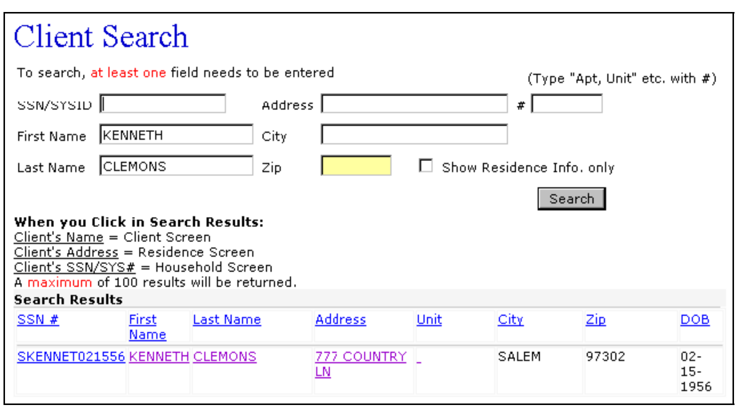


Figure 3-5: Client Search screen - Find household to add client to.

3. Under the ‘Client Information’ section, click the ‘New Client’ button. The Client New Search screen will appear next *(see Figure 3-6)*.

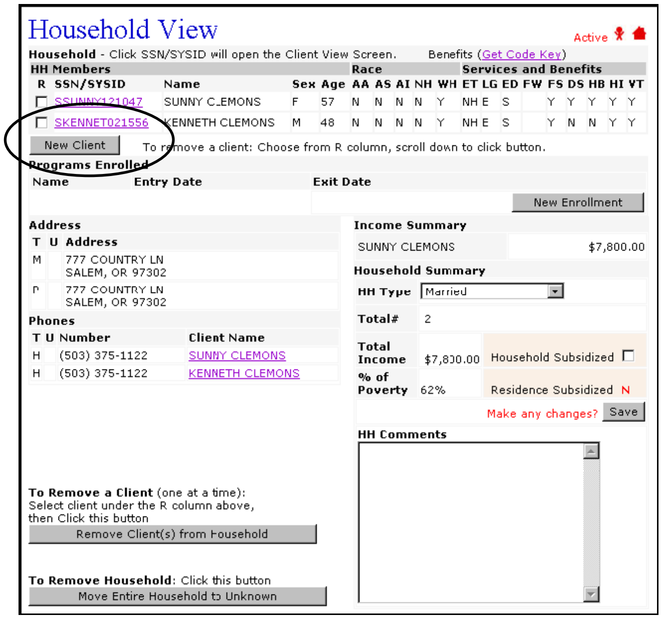


Figure 3-6: Household View of existing household.

4. Search the client before adding them to the household. Follow the steps in Section Two titled, “New Client Search”. If client not found, click the “Add Household Member” button *(see Figure 3-7)*.

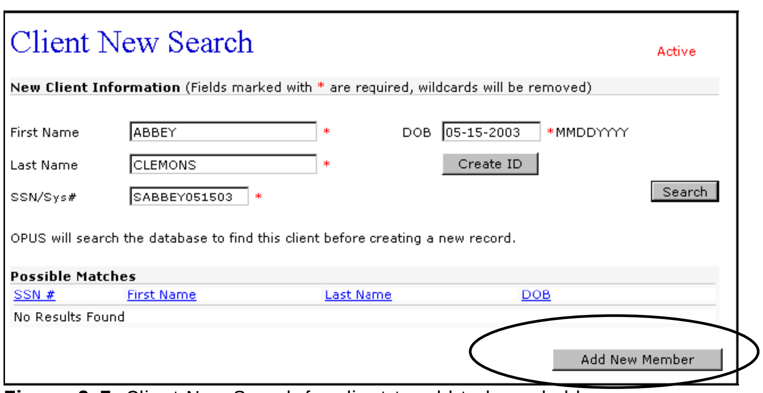


Figure 3-7: Client New Search for client to add to household.

The name, birth date, SYSID/SSN will have already be filled in from being entered on the ‘Client New Search’ screen. Fill in the rest of the Required information *Fields marked * are required.*

a. Title

b. Middle Name

c. The System ID button is available to create a system identification number.

d. SSN Quality Code

e. Phone number, Ext, and Type
f. E-mail address
g. Gender
h. Language
i. Education
j. **1)** Race
  2) Ethnicity
  3) Nationality options (up to 3)
  4) Tribes options (up to 3)
k. Mailing Address: Type in the mailing address for the first client created for a household. For subsequent clients, you can select the address from drop-down menu that displays previous mailing addresses.
l. Street Number
m. Street Direction: S, N, NE, NW, etc.
n. Street Name
o. Street Direction: S, N, NE, NW, etc.
p. Street Type: Ave, Lane, etc.
q. Unit Type: Apt, Unit, PO Box, etc.
r. Enter an apt number or PO Box #
s. Select the Services and Benefits client receives
t. Click the "Save" button.

The Client View screen will appear next.

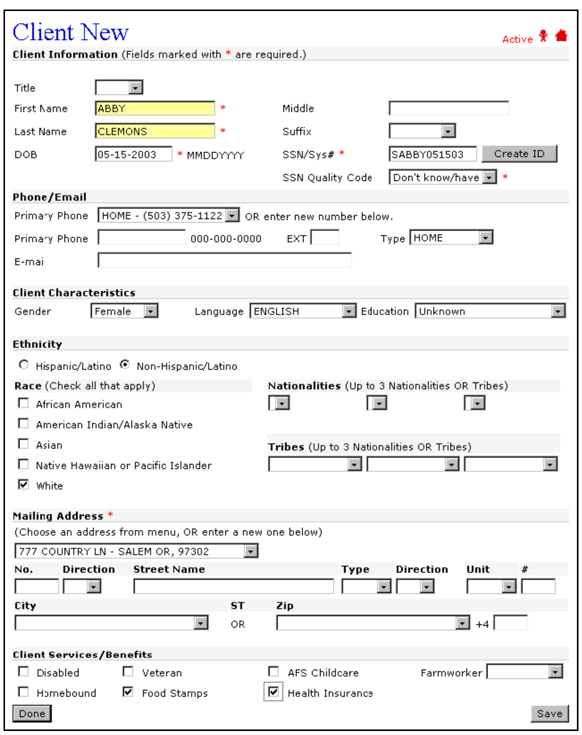


Figure 3-8: Client New screen for new household member.

On the Client View screen, review the information entered.

Note: On the ‘Client View’ screen, a user can select another client in the household from the top right drop-down menu called ‘Select Another Client in HH’. This allows an easy way to get to other clients in the household.

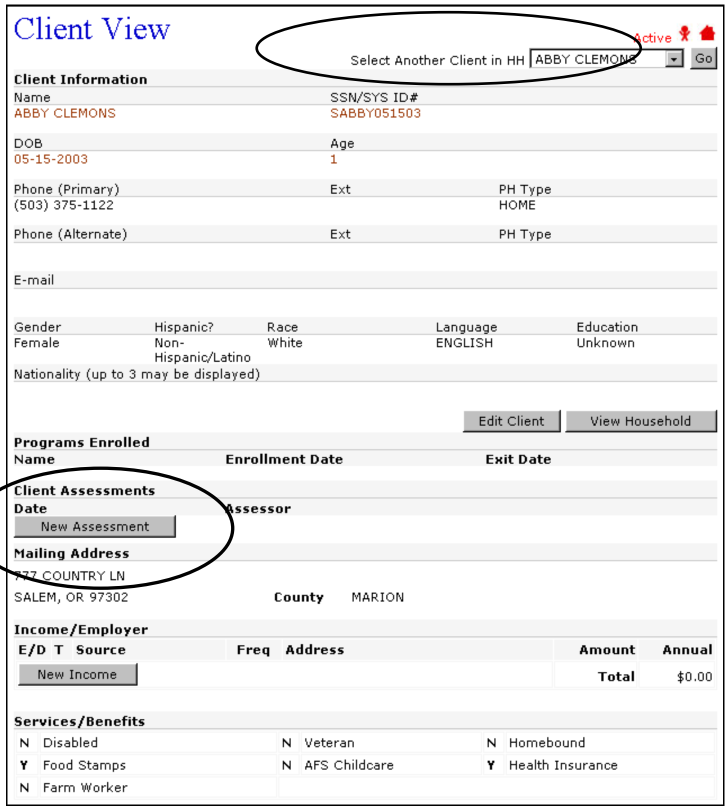


Figure 3-9: Client View screen.

Client(s) - Edit

Setup: You are on any Client View screen in the household.

1. Select a different client name from the menu labeled "Select Another Client in HH", click the ‘Go’ button. The ‘Client View’ screen will appear *(figure 3-10)*.

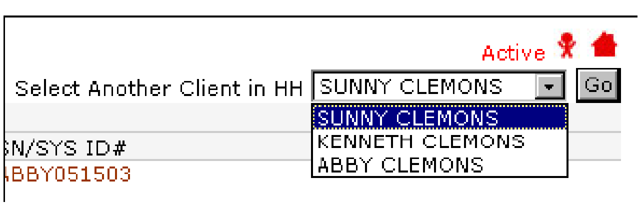


Figure 3-10: Client Select List on the Client View screen.

2. On the Left Nav Bar, click the Client Edit link, or click the "Edit Client" button. The Client Edit screen will appear.

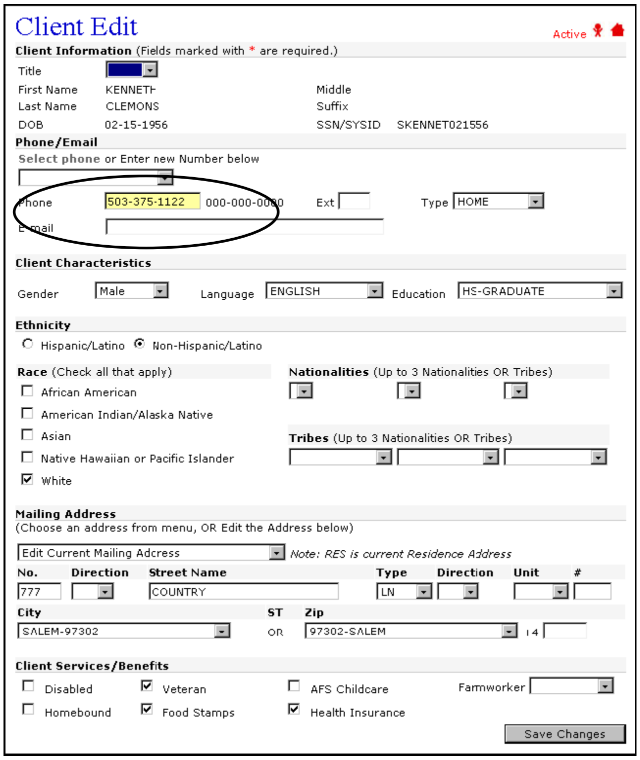


Figure 3-11a: Client Edit screen.

3. On the Client Edit screen, all fields will be in edit mode to update information.

4. In the example, the home phone number was updated. The drop-down box of available phone numbers used by other household clients is available. Select a phone number if the correct one is available or enter a new one. Dashes can be omitted. As you tab out of the box, OPUS will insert dashes automatically.

Note: To update/edit address information, go to the section titled Residence Edit.

5. Click the Save Changes button. The client view screen will appear with the updated changes. Proceed to the next section titled, "Income & Employer Edit, Delete".

Assessment Edit

A client's assessment can be edited. Follow the steps below to updated changes to a client's assessment.

Setup: Start from the Client View screen. Select or type the following (all fields marked with an * are required):

1. On the Client View screen, in the middle of the screen, find the Assessment button *(see Figure 3-9,page 60)*. The 'New Assessment' screen will appear.
2. Select Client to be assessed
3. Enter Assessment date
4. Select Special Needs or disabling conditions.
5. Enter employment information as needed
6. Enter Education information as needed
7. Enter Health and/or pregnancy status
8. Enter Military information
9. If the client being assess is a child, enter school enrollment information.
10. Click the "Save Changes" button. The Client View screen will appear next with the date of the enrollment you completed.

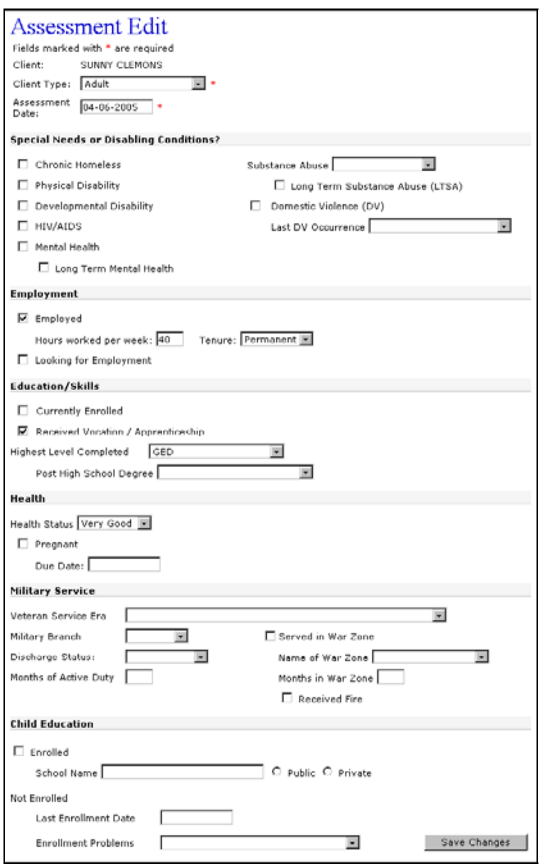


Figure 3-11b: Assessment Edit screen.

Income & Employer Edit, Delete

In this example, we will update a client's income.

Setup: You are on the 'Client View' screen *(Figure 3-12)*.

1. From the menu "Select Another Client in HH", select a client to edit their income, Their Client View screen will appear next.
2. The income from the previous employer is removed by selecting it under E/D column in the income section.
3. Click the 'Delete' button. The income source will be removed.
4. Click the 'New Income' button. The 'Income & Employer – Edit' screen will appear *(Figure 3-13, next page)*.
5. Type or Select (*all fields marked * are required*):
   a. Source: such as employer's name
   b. Type of the income: e.g. SSI
   c. Cash Value (asset)
   d. Frequency
   e. Amount
   f. Verified How: Pay Stub, etc.
   g. Verified By initials will populate with yours, change if needed.
   h. Verified Date (mm-dd-yyyy format)
   i. Comments, as needed
   j. Employer's name
   k. Phone
   l. Address
   m. Click the "Save" button The Client View screen will re-appear next. If a client has another source of income, click the New Income button again and enter the next source.

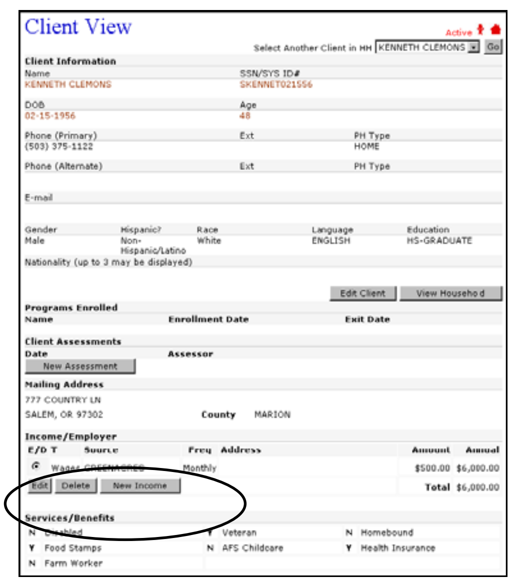


Figure 3-12: Client View screen.

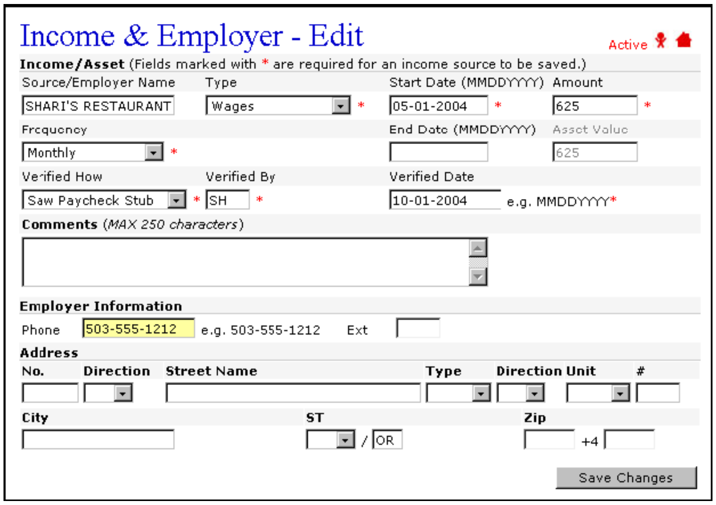


Figure 3-13: Income & Employer screen.

If you need to change something about the income source just entered, select the source, under the E/D (e.g. edit/delete) column, and click the "Edit" button *(Figure 3-14)*. The Income & Employer Edit screen will appear. All the fields will appear in "edit mode". Update the changes and click the "Save Changes" button.

Note: If a client doesn't have an employer or no income, proceed to the next section called "Residence Edit". OPUS has various screens to process moves and merge households.

Income/Employer

E/D	T	Source	Freq	Amount	Annual
⦿	Wages	SHARI'S RESTAURANT	Monthly	$625.00	$7,500.00
Edit	Delete	New Income		**Total**	**$7,500.00**

Figure 3-14: Income/Employer section of Client View screen.

Residence Edit

There may be times when minor edits are needed on the residence screen.

Note: One should not edit an actual residence address unless you have made sure to search for the address in the database that includes the
change to double check that this residence isn't already in the database. If you try to save an address that is currently in the database, you will get an error message that this address already exists in the database.

Setup: You are on the Client View screen.

1. On the Left Nav bar, click the Residence Edit link *(Figure 3-15)*.

2. On the Residence Edit screen, all the fields are in edit mode for you to update *(Figure 3-16)*.

3. When done, click the 'Save Changes' button. The Residence View screen will appear next.

Figure 3-15: Left Nav Bar – Residence Edit

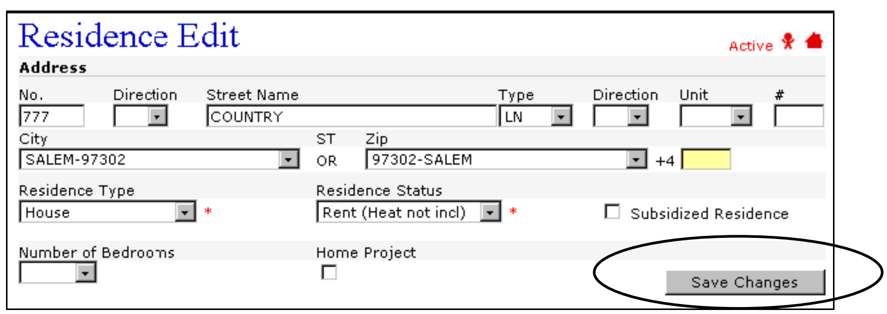


Figure 3-16: Income/Employer section of Client View screen.

Move Household to Unknown

In this example, a household submits their application. A search was completed for the clients but the clients were not found in the database. Next, a search for the client's current address was done as follows:

1. Enter the address to search.
2. Click Search button.
3. Another household (Family A) was found with this address.
4. Click the client SSN to see the 'Household View' screen *(Figure 3-15)*.
5. Since this household needs to move out, scroll down to the bottom of the screen, click the button named "Move Entire Household to Unknown". A popup message will ask if you really want to do this, Click the "Yes" button.

Once the household has been moved out, household will re-display with an "UNKNOWN ADDRESS". It will stay this way until the record is updated again.

Proceed to the next section to move a household to an address in the next section, "Move Household to Existing Residence".

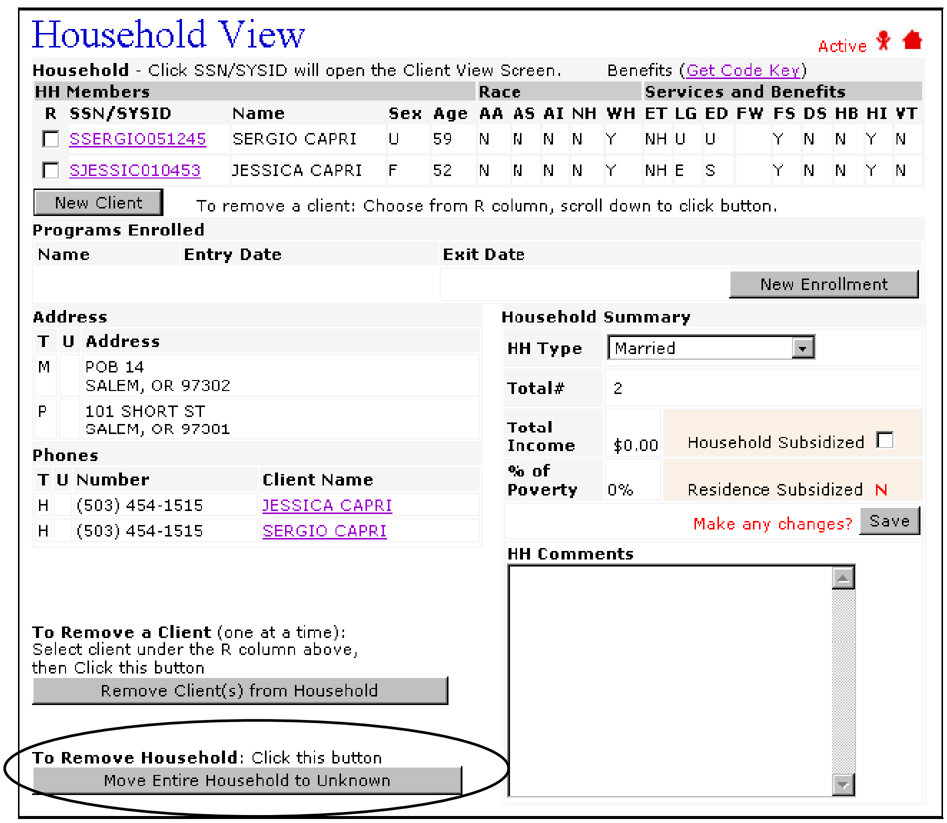


Figure 3-15: Household View - UNKNOWN Address

Remove Client from Household

In this scenario, the previous household member no longer lives there.

Setup: Start from the 'Client Search' screen.

1. Search for the applicant using the SSN/SYSID *(Figure 3-16)*.
2. Click the SSN link to view the Household View screen.
3. Under the "R" column, check the box next to a Client's name that needs to be removed one at a time. Click the button 'Remove Client(s) from Household' at the bottom of the screen.
4. A pop-up message will ask "Are you sure you want to remove the selected clients from household", click the "OK" button.
5. For each client that needs to be removed, repeat step 3. The Household View screen will re-display without the client.

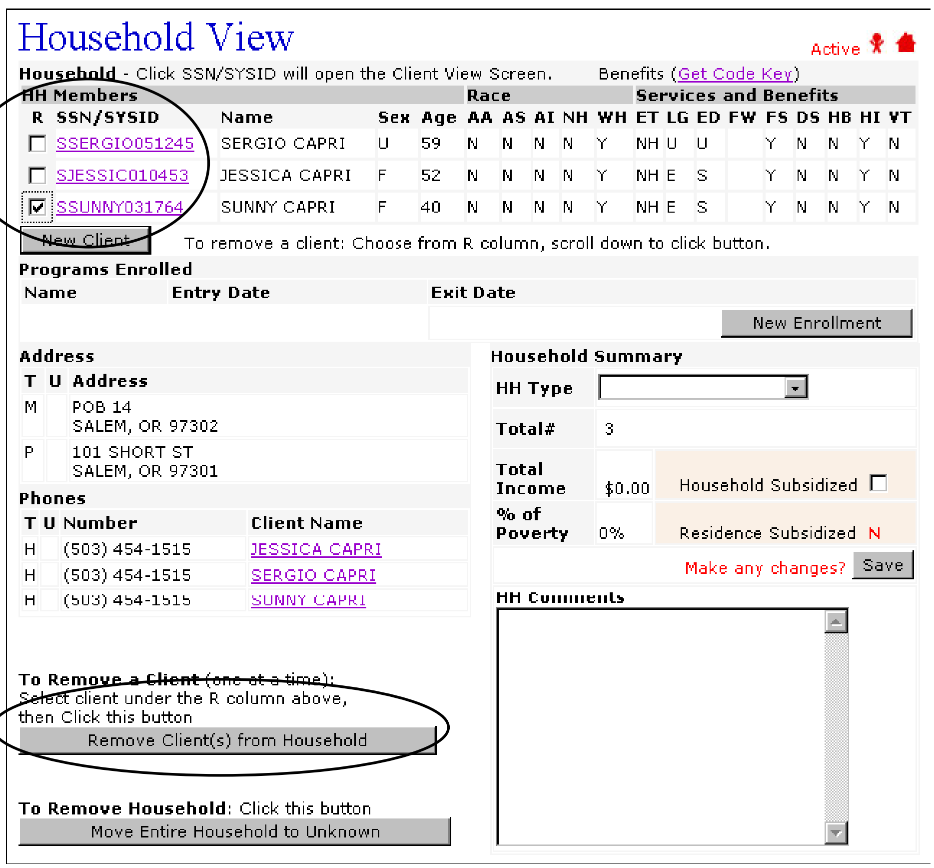


Figure 3-16: Household View - Remove Client from Household.

Move Household to New Residence

In this scenario, the family needs move to a new residence.

Setup: Start from the Client Search screen.

1. Search the new address to see if it already exists in the database.
2. In this case, the residence was not found.
3. On the Left Nav bar, click the Residence New link *(see Figure 3-17)*.

Figure 3-17: Left Nav Bar - Resident New link and HH to Residence link

4. Create the residence (see the section "Residence New" for details).
5. On the Left Nav Bar, Under Moves, click the link 'HH to Residence' *(see Figure 3-17)* followed by *(Figure 3-18)*.

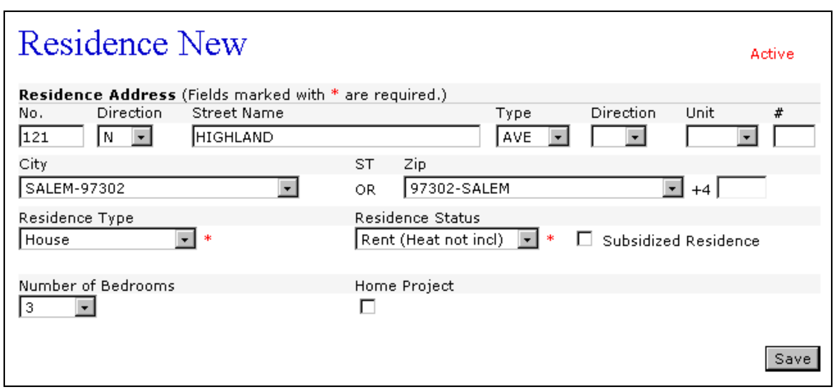


Figure 3-18: Residence New screen.

6. Enter on the left side a household by a SSN and enter a residence address on the right side. Click the "Search" button *(Figure 3-19)*.
7. When both are found, select both on each side *(see Figure 3-19)*.
8. At the bottom of the screen, click the button "Move Household to Residence". A popup message will ask "*Are you sure you want to move the selected household?*" Click the "OK" button. The Household View screen appears next with all household members listed in the new residence.

   Update the Household Information as needed by following steps in the next section title, "Update Household Mail/Ph".

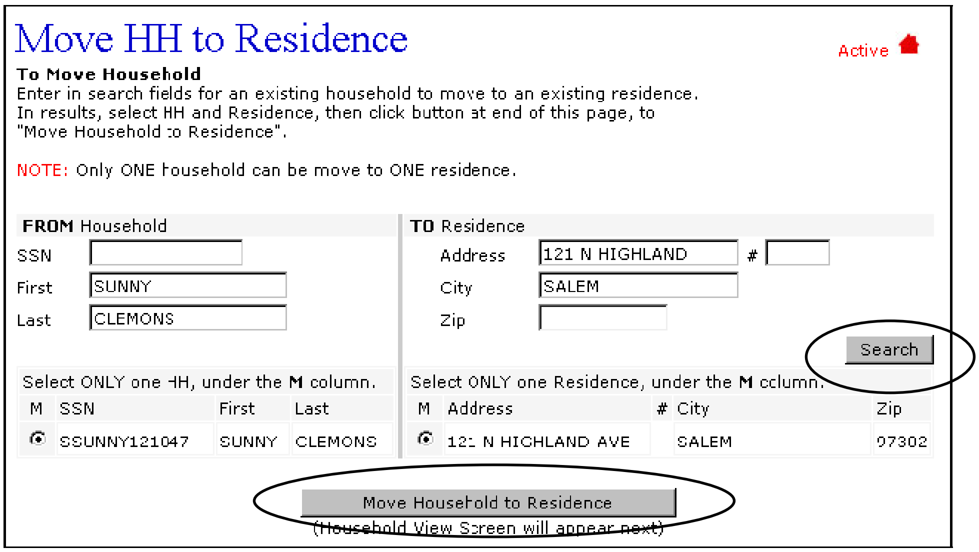


Figure 3-19: Move HH to Residence screen.

Household Mail/Phone Update

Usually after a household move, the address sections will need to be updated for everyone in the household to the same physical and mailing address, and home phone number. The Household Mail/Phone Update screen allows the user to update everyone at one time.

1. On the Left Nav bar, click the Household Mail/Ph Update link *(see Figure 3-20)*.

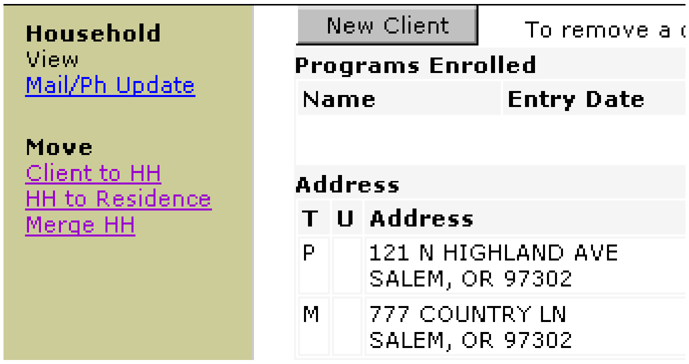


Figure 3-20: Mail/Ph Update link and address area.

The Household Info Update screen will appear next.

2. Select the ''RES' -address to make the mailing address to be the same as physical address for all household members *(Figure 3-21)*.
3. The phone number is available to select to be the same for all clients in household. Select the 'No Change' option.
4. Click the 'Update Changes' button. The Household View screen will re-appear with changes made. Notice a "B" (both) is labeled for the physical and mailing addresses which are now the same.

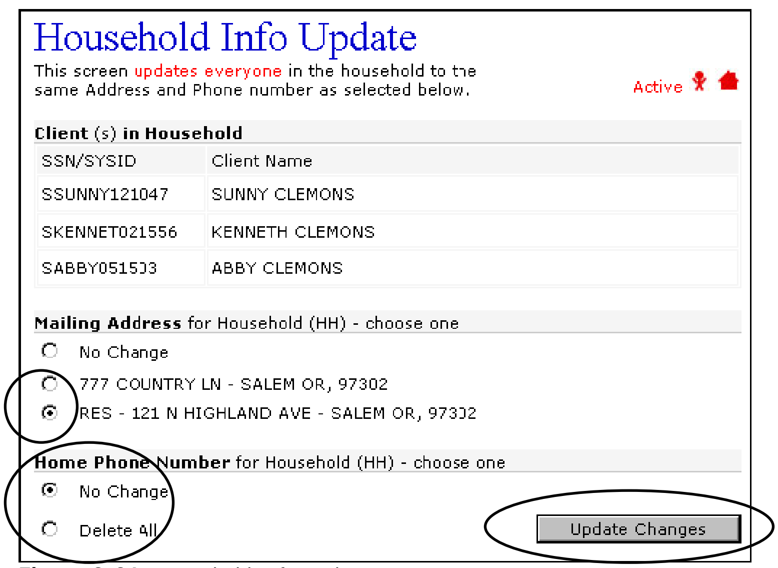


Figure 3-21: Household Info Update screen.

Figure 3-22: Address section of the Household View screen.

Move Household to an 'Existing' Residence

In this example, a family moves to a residence, but the database shows another household living in it.

Setup: You are on the 'Client Search' screen *(Figure 3-23)*.
We'll perform the following functions which are two moves previously explained but each works together to accomplish this objective:
* Move "old" household into 'Unknown'
* Move "new" Household into Residence

1. Search the clients and the address on the new client intake form.
- The clients with the old address are found.
- The new address is found but a different Family (B) has the address.

2. Move Family (B) out:

a. Search a client from Family (B), and click their SYSID to bring up their Household *(Figure 3-23)*.

b. At the bottom of the screen, click the button, 'Move Entire Household to Unknown' *(Figure 3—25)*. A message will pop-up asking, "*Are you sure you want to move entire household to unknown?*" Click the "OK" button.

c. The former household, Family (B), will not include an address any longer.

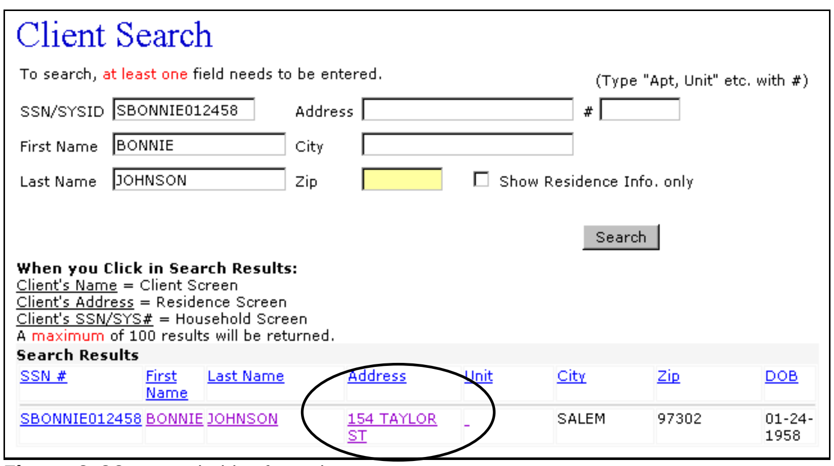


Figure 3-23: Household Info Update screen.

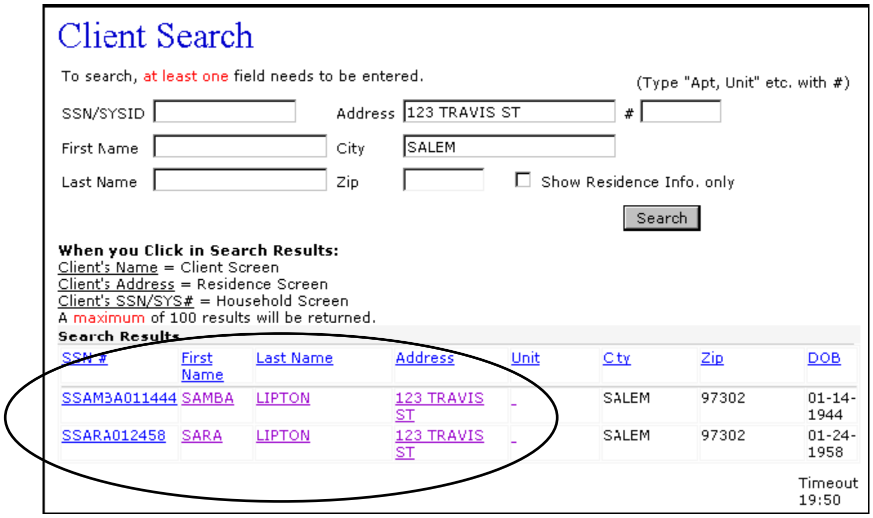


Figure 3-24: Client Search screen.

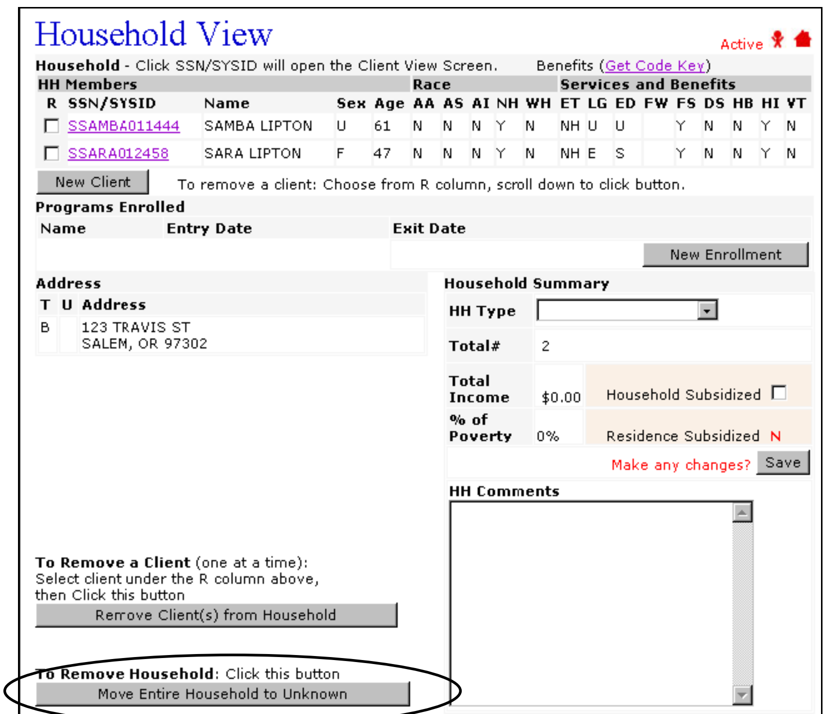


Figure 3-25: Household View screen.

Move Family (A) into the vacated residence:

d. On the Left Nav bar, click the HH to Residence link *(Figure 3-2, 6 next page)*.

e. Enter a client from Family (A) on the left side, and enter the address of the household that the family should be moved to on the right side. Click the Search button *(Figure 3-27, next page)*.

f. On the left side, select Family (A) Client under the "M" column, and on the right side, select the address that the Family should be moved to.

Figure 3-26: Move HH to Residence screen.

g. Click the button ‘Move Household to Residence’. A popup message will ask you "*Are you sure you want to move the selected household?*", click the “OK” button.

h. The Household View for Family (A) will display with the correct address. Update the Household Information as needed by following steps in the previous section title, “Update Household Mail/Ph”.

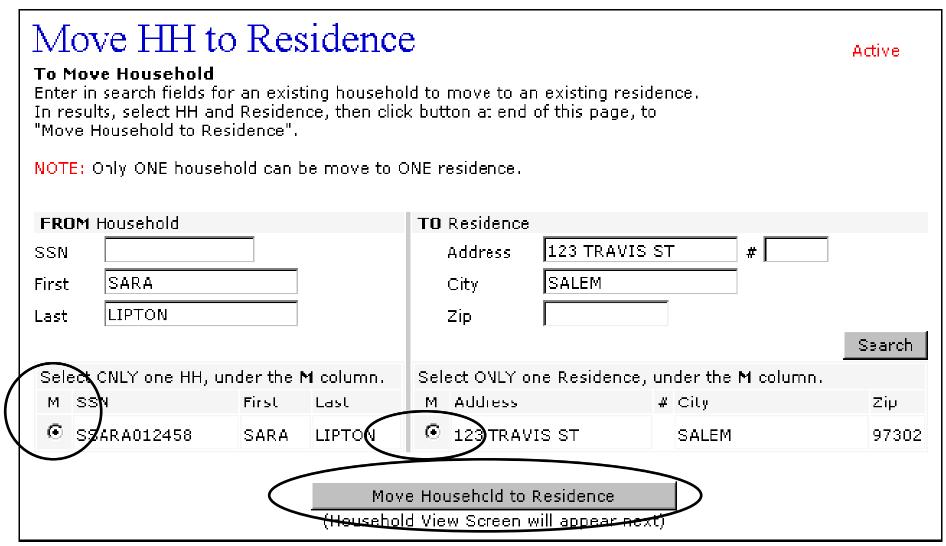


Figure 3-27: Move HH to Residence screen.

Figure 3-28: Popup Message.

Move Client(s) to another Household

This example involves moving existing client(s) from one household to another.

Setup: You are on the Client Search Screen.

1. Search for client (A) that needs to be moved to a different household.
2. When client (A) found, click the 'Move Client to HH' link on the Left Nav Bar *(see Figure 3-29)*.
3. Enter a SSN for client (A) on the left side, and a SSN for a client living in Household (B) on the right side to be merge with *(see Figure 3-29)*.
4. Click the 'Search' button.
5. In the results, under the "M" columns, select the two records to be merged.
6. Click the button 'Move Client(s) to Household'. A pop-up message will ask you "*Are you sure to want to move the selected client(s)?*". Click the "OK" button. Update the household information as needed by following steps in the previous section title, "Update Household Mail/Ph".

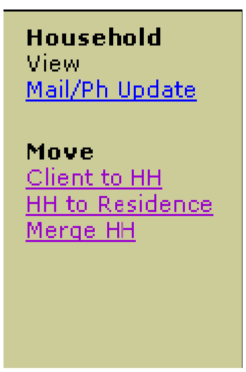


Figure 3-29: Move Client to HH link.

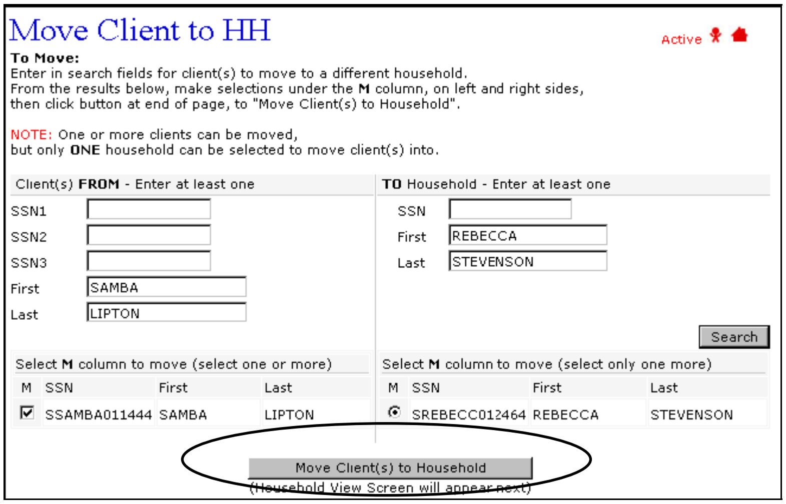


Figure 3-30: Move Client to HH.

Merge Household with another Household

In the example, two households need to be merged together.

Setup: You are on the 'Household View' screen of one of the households you want to merge.

1. On the Left Nav Bar, click the 'Merge HH' link *(figure 3-30)*. The 'Merge Households' screen will appear next *(Figure 3-31)*.

Figure 3-30: Left Nav Bar - Merge HH link

2. On the left-side, enter a name or SYSID of a client of the household you want to merge, and on the right-side, enter a name or SYSID of a client in the household to merge to. Click the "Search" button *(Figure 3-31)*.

3. Select the two records in the results section, and click the "Merge Households" button.

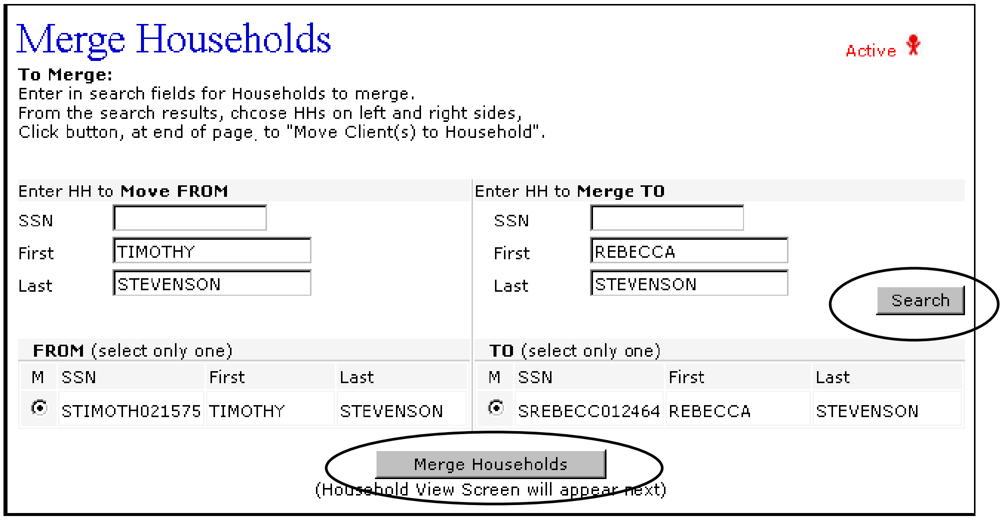


Figure 3-31: Merge HH screen

4. A message popup will ask "*Are you sure you want to merge the selected households?*", click the "OK" button. The Household View screen will re-appear with both households together and clients listed in age order. Update the Household Information as needed by following steps in the previous section title, "Update Household Mail/Ph" *(Figure 3-32)*.

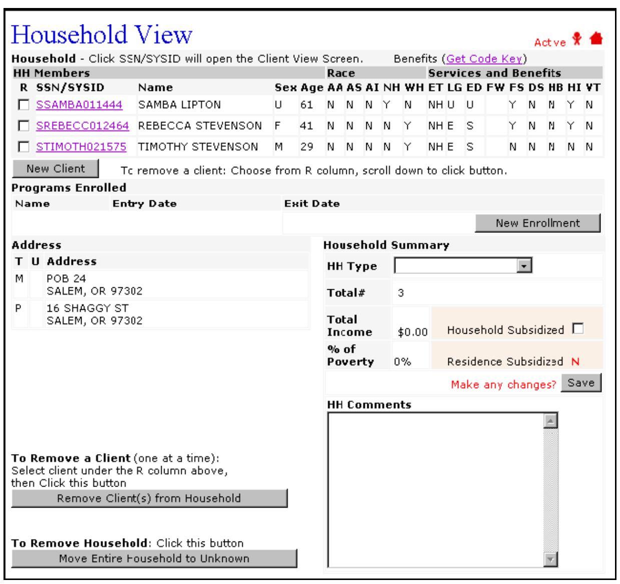


Figure 3-32: Household View after a merge.

User Manual Addendum

HMIS -CoC Module
New Features or Functions

Client Intake / Case Management Functions

Household Mail/Phone Update

New option
- 'Delete All' option
You now have the ability to select from three options to update everyone in the household to the same phone number.
Setup
You are on a client's Household View screen.
1. On the Left Nav Bar, click the HH Mail/Ph Update link. This screen will appear next (*see Figure 1-1*).

2. On the Household Info Update screen, under the **'**Home Phone' section, select from three options to update all household members at once:
- No Change
- Delete All associated with HH
- Choose a main phone number for all in the Household.

Figure 1-1: Left Nav - HH Mail/Ph Update

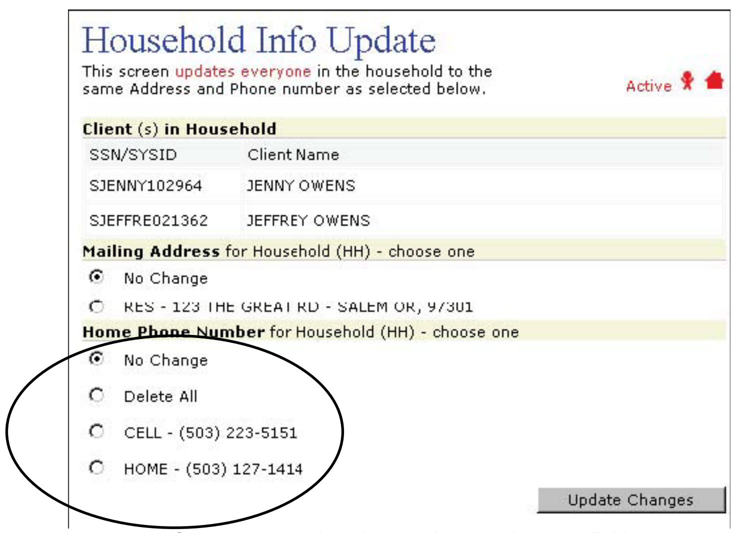


Figure 1-2: Under Phone: Three options available.

Client Intake Assessments - New

Overview

There are two screens to create client assessments; the ‘Client View’ screen, and the ‘Program Enrollment Summary’ screen, which is explained in a separate section titled ‘Program Enrollment Assessments’. A client assessment can be completed from the ‘Client View’ screen. The assessment is <u>not</u> attached to any ‘program enrollment’ at this point.

If the client will eventually be enrolled in a program, you can choose to complete the assessment from the ‘Client View’ screen, or wait to do this step at the ‘Program Enrollment’. Additional steps are required as described in the section titled ‘Program Enrollment Assessments’.

Setup: You are on the Client View screen.

1. In the Assessments section, find the ‘New’ button (*see Figure 1-3*). The ‘Assessment New’ screen will appear.

Figure 1-3: Client View

2. There are three fields required on the 'Assessment New' screen. Fields marked with an * are required.

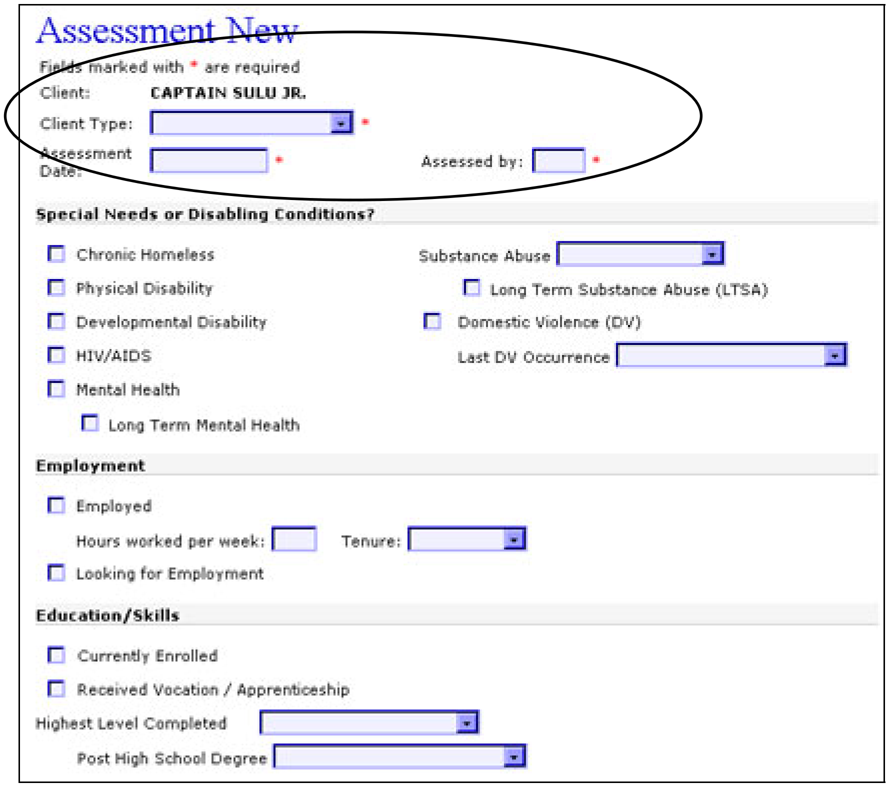


Figure 1-4: Assessment New

3. Fill out the fields that apply to the current client who is being assessed.

Note: This screen isn't for a household assessment. If a field isn't applicable to the client, you don't need to fill it out; i.e. child education for adults.

Client Assessment - Edit

An assessment can be edited, once it's been saved. Follow steps below to edit.

Setup: You are on the 'Client View' screen.

1. In the section labeled 'Client Assessments', click the 'date' link that needs to be edited *(see Figure 1-5)*. The Assessment Edit screen will appear.

Figure 1-5: Client View

2. There are three required fields on the Assessment Edit screen, fields marked with an * are required.

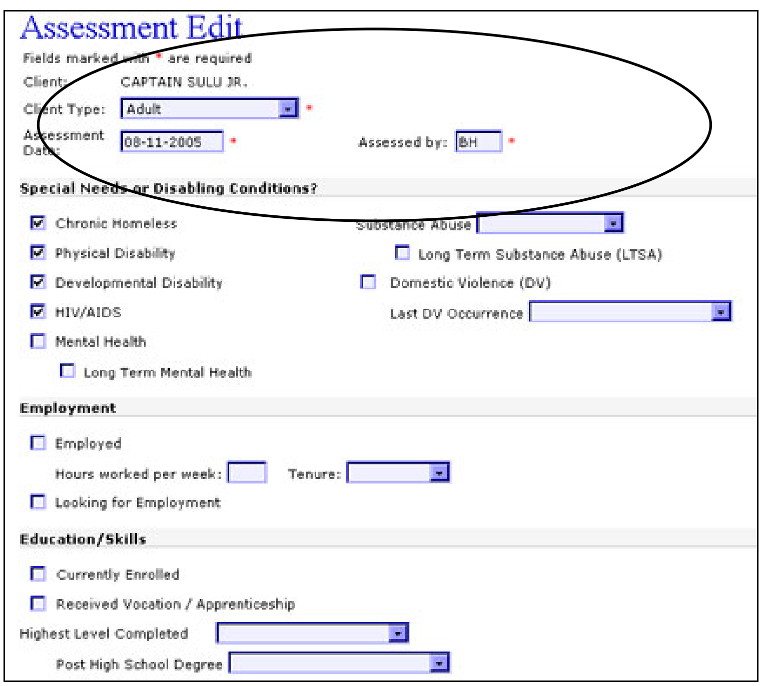


Figure 1-6: Assessment Edit

3. Make the necessary changes and save.

Program Enrollment

New Features:

- At Risk or Homeless
- Income section to apply to enrollment

Setup: You are on the 'Household View' screen.

1. In the section labeled 'Programs Enrolled', click the 'New Enrollment' button *(see Figure 1-7)*.

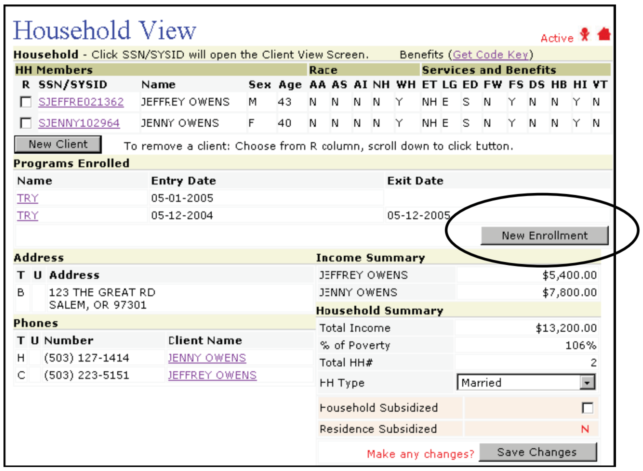


Figure 1-7: Household View screen.

The Program Enrollment New screen appears next *(see Figure 1-8)*.

2. Select a client to enroll, and enter the enrollment date. Click 'Load' button to load the client's eligibility information *(see Figure 1-9)*.

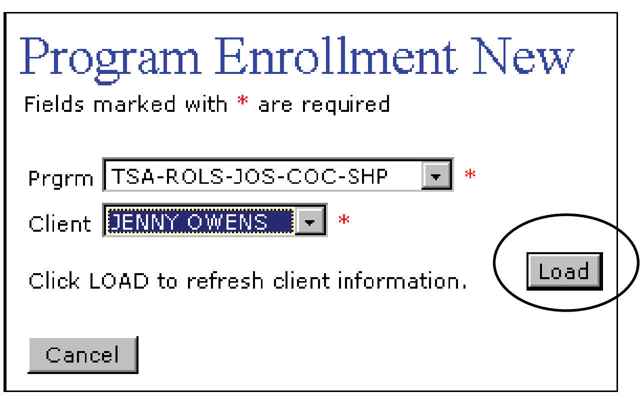


Figure 1-8: Program Enrollment before Load

Note: Once the Load button has been clicked the first time, it becomes disabled. If you need to load a different client's information, select the client and the 'Load' button will become active again.

3. Fill out the following required * fields:
- Select whether Client is at Risk or Homeless
- Start Date
- Last Residence
- Length of Stay
- Last Zip Code
- Zip Code Quality Code (Zip DQC)

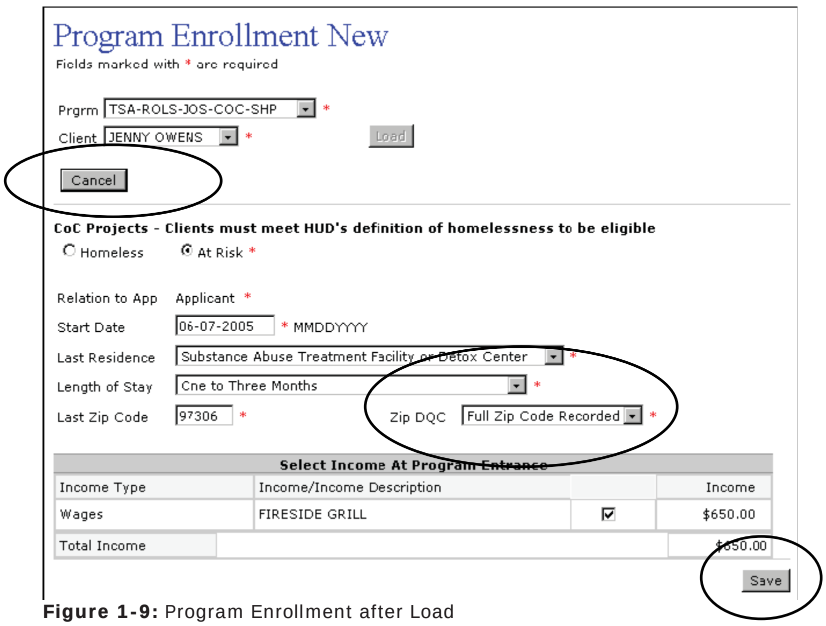


Figure 1-9: Program Enrollment after Load

4. Select client's income source if it is an eligible source to be counted.

5. Click the Save button. The first client has been enrolled. If another client in the household needs to be enrolled in the same program, the Program New screen will appear again for you to select the next client *(see Figure 1-10)*.

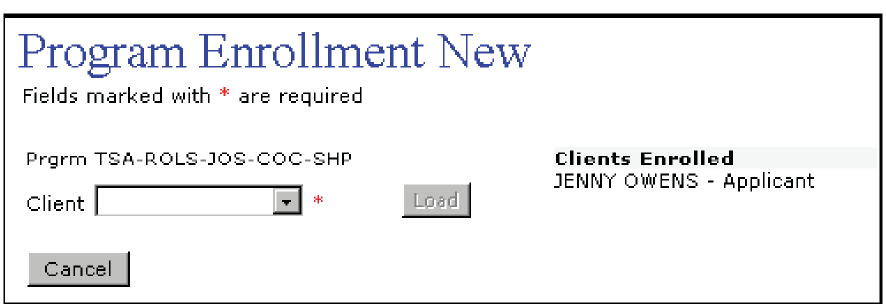
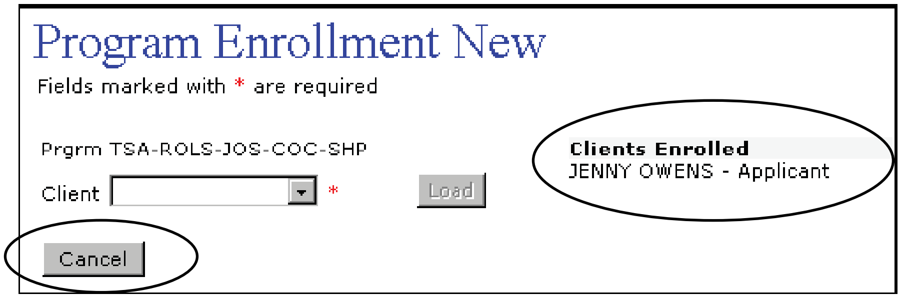


Figure 1-10: Program Enrollment - Next Client

6. The first client that was enrolled will be displayed to the right-side of the screen *(see Figure 1-10)*.



7. If another client is to be enrolled in the same program, select the next client. If no other client is to be enrolled, then click the 'Cancel' button *(see Figure 1-10)*.

8. Once you have enrolled all household members, click the Cancel button, the Program Enrollment Summary screen will display next *(see Figure 1-11)*.

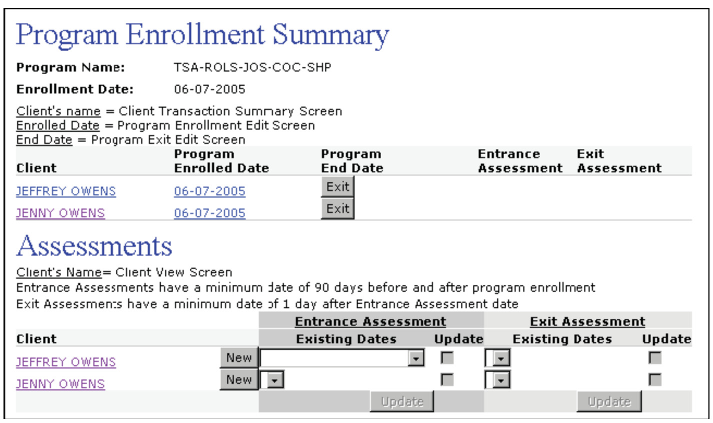


Figure 1-11: Program Enrollment Summary

9. If all household member was enrolled, the 'Household Transaction Summary' screen will display automatically after the last client was enrolled *(see Figure 1-12)*.

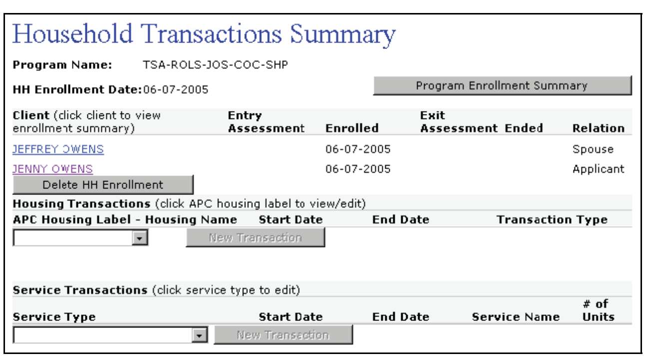


Figure 1-12: Household Transaction Summary

10. In order to provide a service transaction or a housing transaction to a client, you need to be on the 'Household Transaction Summary' screen. On the Left Nav Bar, under Transactions, click the link 'HH Summary' *(see Figure 1-13)*. The Household Transaction Summary screen will appear next.

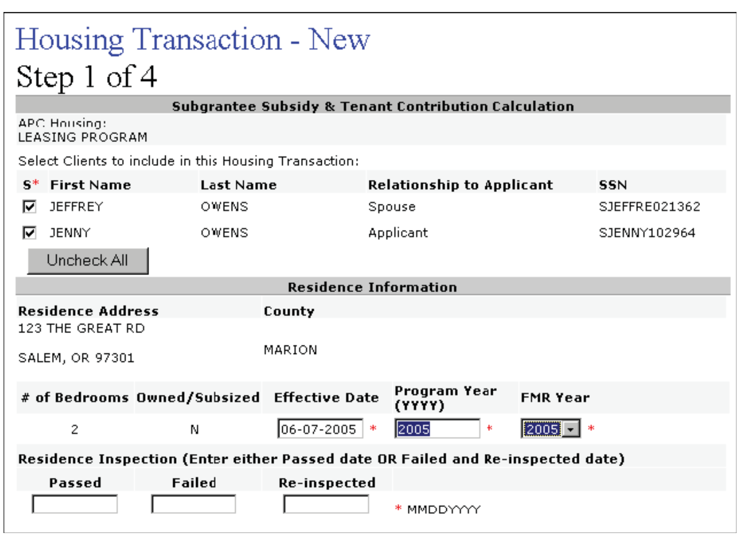
Figure 1-13: Under Transaction, HH Summary

Housing Transaction New - Step 1

New Feature

- FMR field available

1. On the Housing Transaction-New; Step 1 screen, the FMR field has been added *(see Figure 1-14)*.



Housing Transaction - New

Step 1 of 4

Subgrantee Subsidy & Tenant Contribution Calculation

APC Housing:
LEASING PROGRAM

Select Clients to include in this Housing Transaction:

S*	First Name	Last Name	Relationship to Applicant	SSN
☑	JEFFREY	OWENS	Spouse	SJEFFRE021362
☑	JENNY	OWENS	Applicant	SJENNY102964

Uncheck All

Residence Information

Residence Address	County
123 THE GREAT RD SALEM, OR 97301	MARION

# of Bedrooms	Owned/Subsized	Effective Date	Program Year (YYYY)	FMR Year
2	N	06-07-2005 *	2005 *	2005 *

Residence Inspection (Enter either Passed date OR Failed and Re-inspected date)

Passed	Failed	Re-inspected	
			* MMDDYYYY

Figure 1-14: Housing Transaction New - Step 1

Service Transaction – Edit **New Feature**

- Delete Service button

There is now the ability to delete a service transaction on the Service Transaction–Edit screen *(see Figure 1-16)*.

How To Get There

You need to be on the 'Housing Transaction Summary' screen. In the section labeled 'Service Type' *(see Figure 1-15)*, click the service name to be edited or deleted.

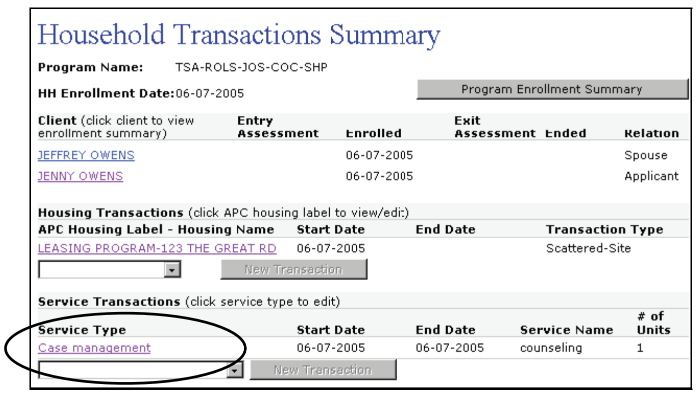


Figure 1-15: Housing Transaction New - Step 1

The Service Type-Edit screen will appear *(see Figure 1-16)*. The delete button is located near the Save button at the bottom of the screen. *(see Figure 1-16)*.

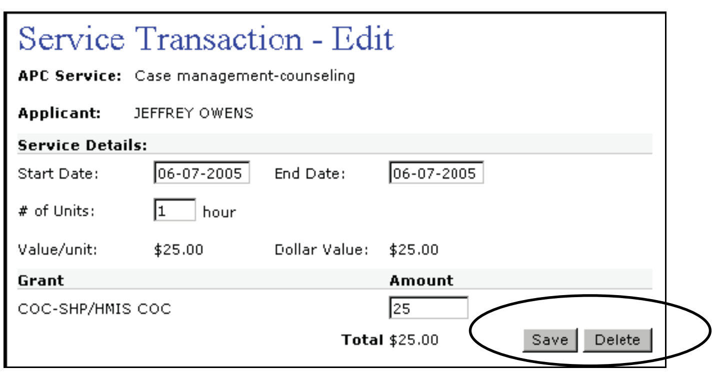


Figure 1-16: Housing Transaction New - Step 1

Program Enrollment Assessment

New Feature

- Connect Assessment to Enrollment

When an assessment has been completed from a ‘Client View’ screen, the assessment isn’t automatically tied to the Client’s program enrollment transaction. To connect the assessment, follow the guidelines below:

Setup: Start from the Household Transactions Summary screen.

1. On the Left Nav Bar, click the link ‘Program Summary’ *(see Figure 1-18)*. The Program Summary screen will appear.

Figure 1-18: Left Nav Bar - Program Summary

2. In Assessments section, there are two columns, 1-Entrance Assessments, and 2-Exit Assessments. Exit assessments will be explained in the next section.

Connect Previous Assessment to Enrollment

If clients have been assessed before, i.e. the Client View screen, the previous date(s) will be available to choose from under the ‘Entrance Column’. To connect the program enrollment to a previous assessed date, simply select it from the drop-down menu. The “update” box next to the menu will automatically be checked *(see Figure 1-19)*. Click the ‘Update’ button to complete the connection of the enrollment to the date.

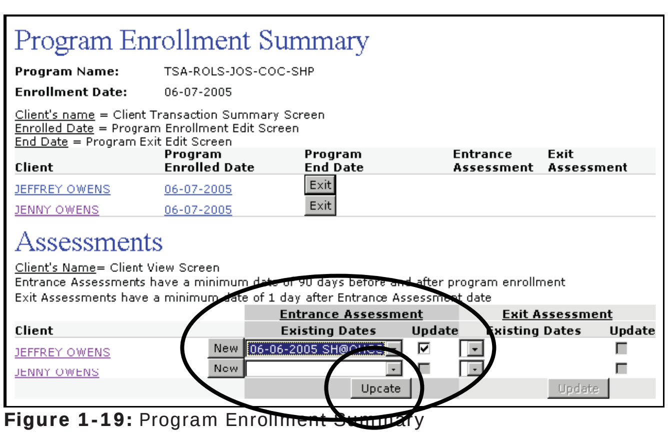


Figure 1-19: Program Enrollment Summary

Create a New Assessment for Enrollment

If the assessed date doesn't already exist and there is a need to create a new assessment to be used with the enrollment. Click the 'New' button. Fill out the Assessment New screen and 'save'. The Program Enrollment Summary screen will re-appear, and the date will be available to choose from the drop-down menu. Select the new date, and the 'update' box next to the menu will automatically be checked. Click the 'Update' button to connect the assessment date to the program enrollment. The assessed date will appear in the upper part of the screen in the client list section *(see Figure 1-20)*.

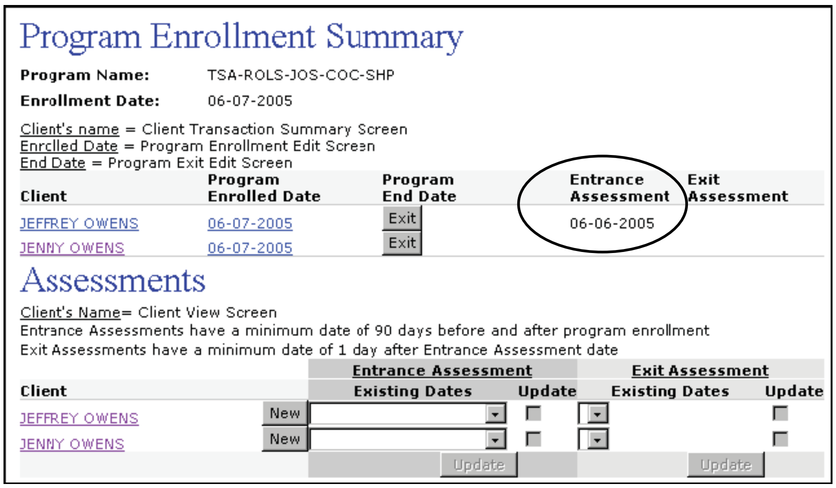


Figure 1-20: Assessed Date displayed in client list.

Assessment Exit

New Feature

- Option to complete an Exit Assessment. To do so, follow the steps below:

Setup: Start from the 'Program Enrollment Summary' screen and find the Assessment section in the lower part of the screen *(see Figure 1-21)*.

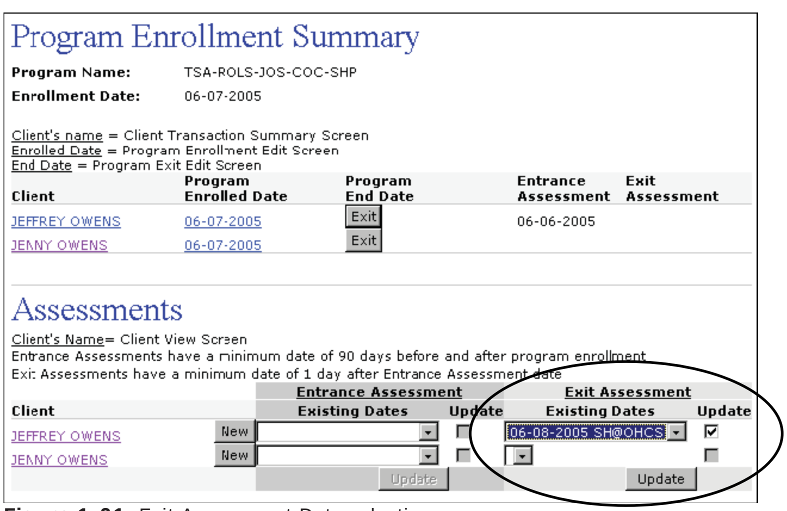


Figure 1-21: Exit Assessment Date selection.

1. If there is no assessment dates available to select under the 'Exit Assessment column, create a new assessment by clicking the "New" button under the entrance column. Fill out the assessment form **using a date that is at least one day after the 'Entrance Assessment' date,** otherwise it won't display in the drop-down menu for exit assessments.

2. Save the new assessment and the 'Program Enrollment Summary' screen will re-display. The date will now be available in the drop-down menu under the 'Exit Assessment' column *(see Figure 1-21)*. Select the date; the 'update' box next to the menu will automatically be checked. Click the Update button. This will connect the newly created exit assessment to the program enrollment. The exit assessment date will appear in the upper part of the screen in the client list section *(see Figure 1-22)*.

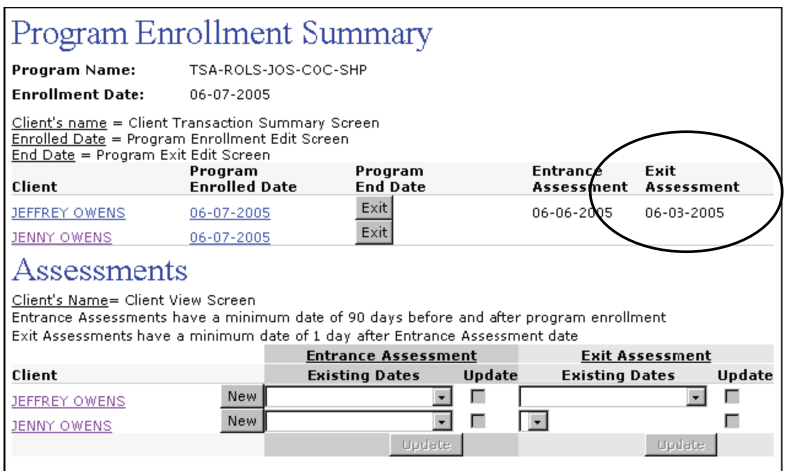


Figure 1-22: Exit Assessment Date displayed.

Program Exit

New Features

Two new areas are displayed on the 'Program Exit-New' screen.

- Assessment Entrance / Exit Dates
- Income display

1. On the 'Program Exit-New' screen, the entrance and exit assessment dates will display now *(see Figure 1-23)*. If there were no assessment dates tied to the client's program enrollment, the words 'Not Assigned' will appear in Red Lettering *(see Figure 1-24)*.

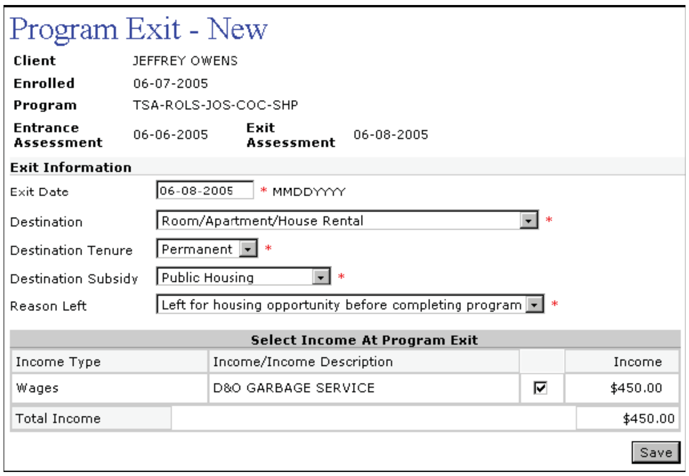


Figure 1-23: Program Exit.

2. Complete the required fields marked with an * and verify that the current income on client exit is correct *(see Figure 1-24)*. If income needs to be corrected, go to "Income/Employer Edit" screen and update the client's income.

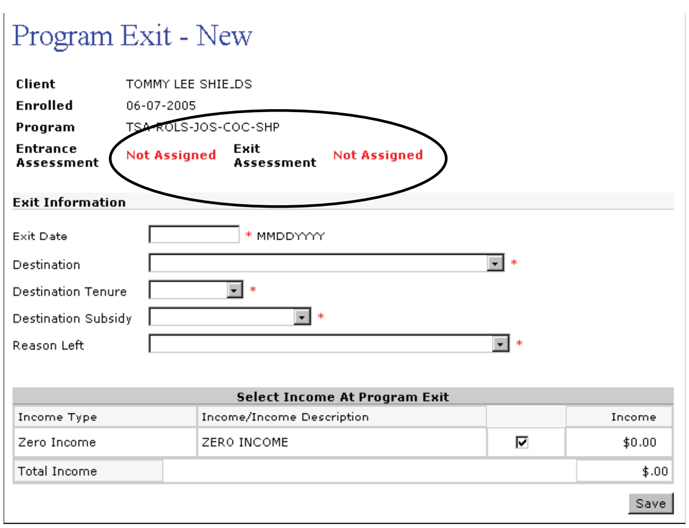


Figure 1-24: Program Exit - 'Not Assigned' Assessment dates.

3. Click the Save button and the 'Program Enrollment Summary' screen will re-appear with the 'Exit' date displayed in the client list section *(see Figure 1-25)*. This completes exiting a client from a program.

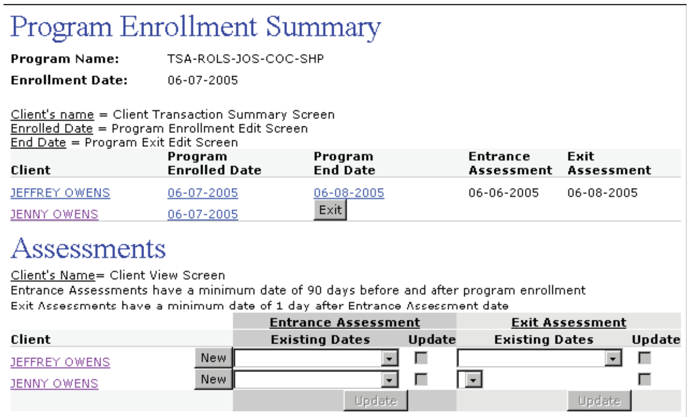


Figure 1-25: Program Enrollment Summary Screen - 'Not Assigned' Assessment dates.

User Permissions Update

New Feature

- New screen actions / permissions added.

As new screen features and functions are added to the OPUS system, this causes new actions to appear in the User Roles / Actions list of the 'User Search' screen. It is strongly recommended that managers and admin-level users regularly review and update their user lists, verifying all the actions associated with their roles are updated as new features are added to the OPUS system. Follow the steps below to verify the new actions/permissions have been added to the user role lists.

Setup: You should be on the 'User Search' screen. From the main menu, scroll the cursor over the "Management", click on User. The User Search screen will appear.

1. Click on the 'Agency' drop-down button, click on the appropriate agency name to search for all users *(see Figure 1-26)*. 2 Select a user to review. The 'User View' screen will appear next *(see Figure 1-26)*. Click on the 'user' name in 'Search Results' to view and/or edit roles.

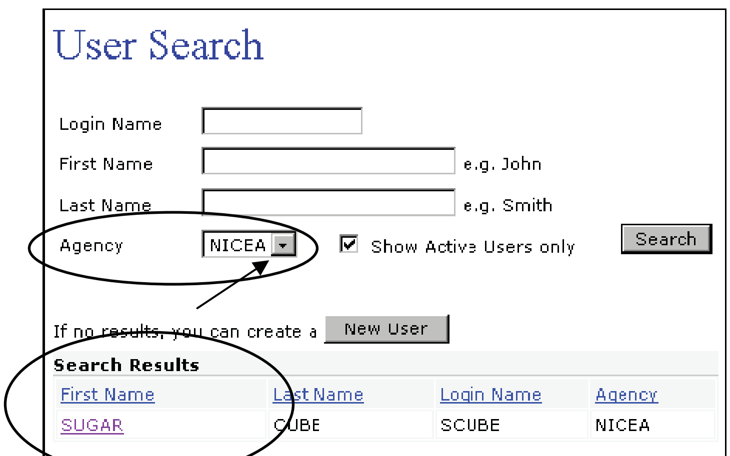


Figure 1-26: User Search.

2. Select a user to review roles. The 'User View' screen will appear next *(see Figure 1-27)*.

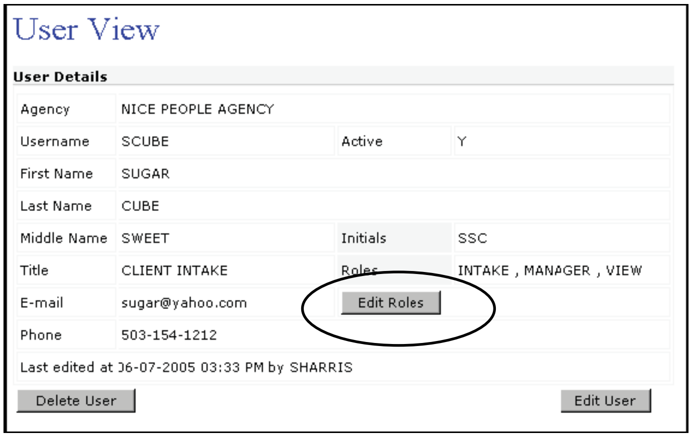


Figure 1-27: User View.

3. Click the Edit Roles button in the middle of the screen *(see Figure 1-27)* the 'User Role Edit' screen will appear *(see Figure 1-28)*.

Figure 1-28: User Role Edit.

4. Click a role to review for any new actions, permission that has been added to a role recently. The User Action Edit screen will appear next *(see Figure 1-29 on next page)*.

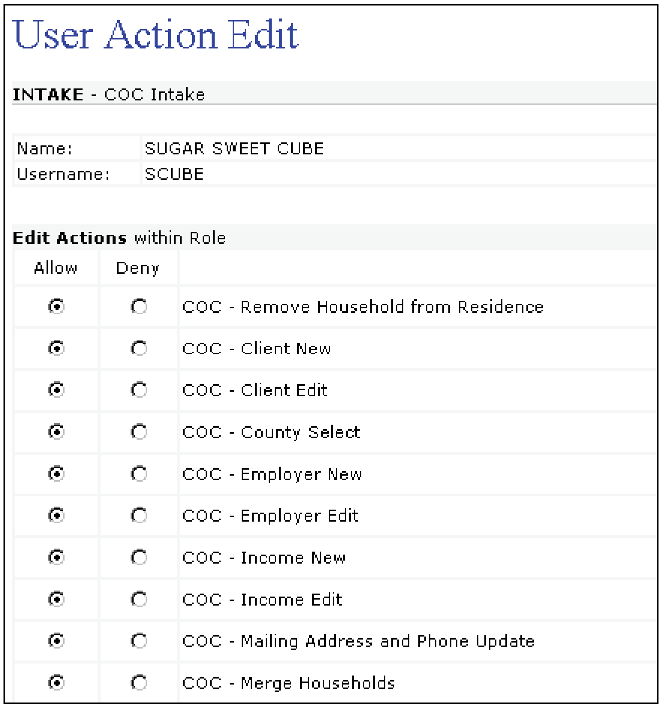


Figure 1-29: User Action Edit.

5. On the 'User Action Edit' screen, review the action list for any new screen actions that were added. Sometimes, new actions are listed at the bottom of the list *(see Figure 1-30)*. Mark/check the actions to 'allow" or "deny". Click the 'Save' button. The 'User Role Edit' screen will re-appear.

This completes the User Role/Action Update process.

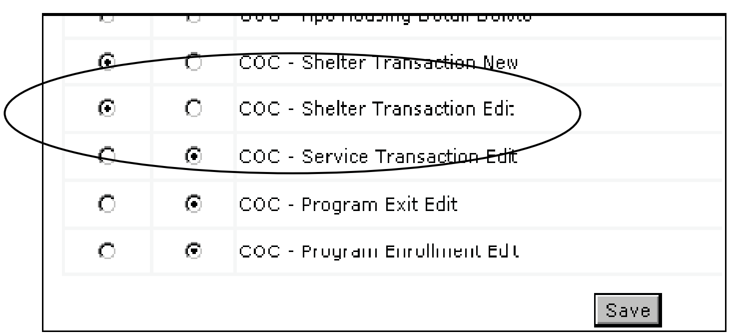


Figure 1-30: User Action to Allow or Deny.

Service Transaction Detail - Edit

New Features

- Service Detail Delete button

A delete button is available on the 'Service Transaction Detail–Edit' screen.

Note: If transactions have already been assigned to a service, the service can not be deleted. A user would want this ability to delete after they first created the service and no client transactions have been assigned yet.

How to Get There

Start from the APC Search screen, (Management > APC). Click an APC to view.

1. On the APC View screen at top, click the View Services button. The APC Services Summary screen will appear *(see Figure 1-31)*.

Figure 1-31: APC View - View Services Button.

2. Click a 'Service Type' link to see the Service Transaction Detail screen that will appear next *(see Figure 1-32)*.

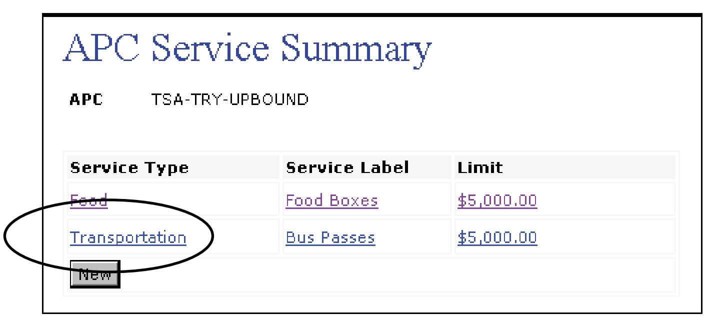


Figure 1-32: APC Services Summary.

Service Detail Delete

3. At the bottom of the screen, a delete button is available to remove the service *(see Figure 1-33)*.

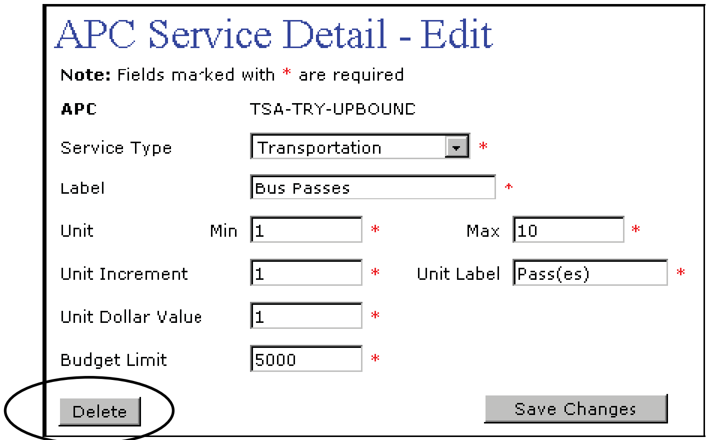


Figure 1-33: Service Transaction Detail.

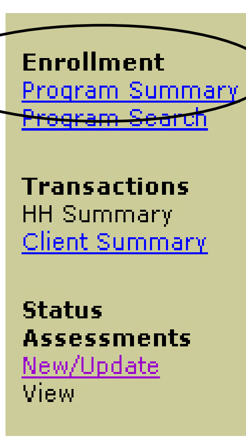
Note: A user could only delete a service if they <u>initially</u> created it at the admin level at the time of APC setup. Once client transactions are connected to a service, the service can't be deleted from the APC.

Case Plan

Case Plan

Case plans can have several components involved in OPUS, they the following are: the case plan, action plans, action steps, case notes, and tickler alerts. Each agency can decide how much of a component each case plan should include and it may depend on the goals set forth for each household an agency works with. All of the processes will be explained in the following examples.

Setup: On the 'Household Transaction Summary' screen, click the 'Program Enrollment Summary' button on the Left Navigation Bar at the top left side of the screen *(see Figure 5-12 below)*.
The Program Enrollment Summary screen will appear next *(Figure 5-13, next page)*.



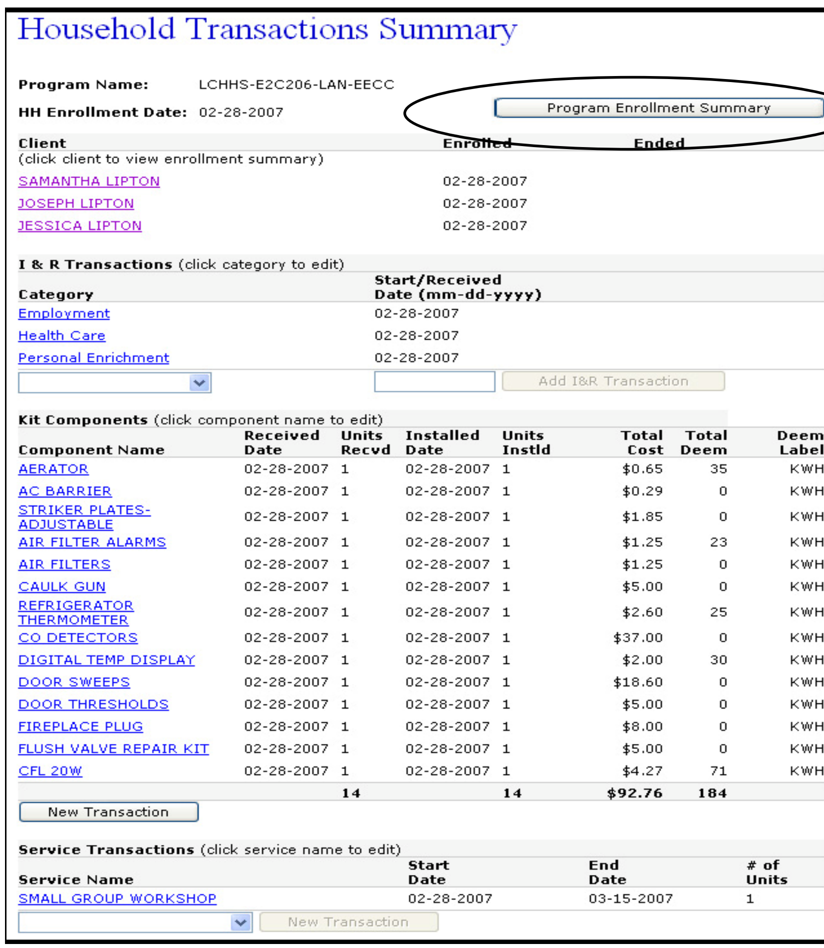
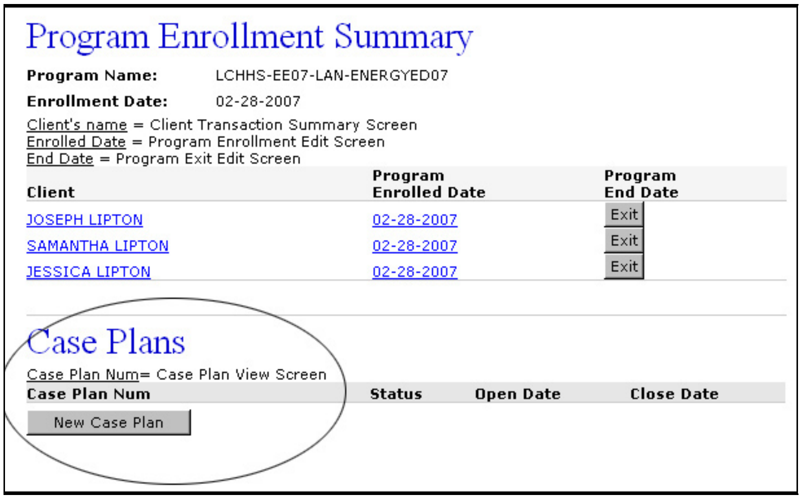


Figure 5-12: Household Transaction Summary screen

Program Enrollment Summary

The ‘Program Enrollment Summary’ screen provides links to the household’s case plans which may be one or many. Initially, there isn’t a case plan presently displayed.



* *

Figure 5-13: Program Enrollment Summary

Case Plan New

1. Click on the ‘New Case Plan’ button to begin. The ‘Case Plan New’ screen will be displayed *(see Figure 5-14)*. Enter a ‘Case Plan Number’ (if you want OPUS to create one, leave it blank), the ‘Open/Start date’, and ‘Projected close date’. Select the client(s) in the household who will be participating in the case plan.

Select the case workers from your agency that need to be involved with the household and assign them the correct privilege (Normal or View Only) allowing access to the specific case plan information. Agency case workers who have authorized access to case management functions of the module will also be listed. Select those case workers you want to have access to specific case plan.

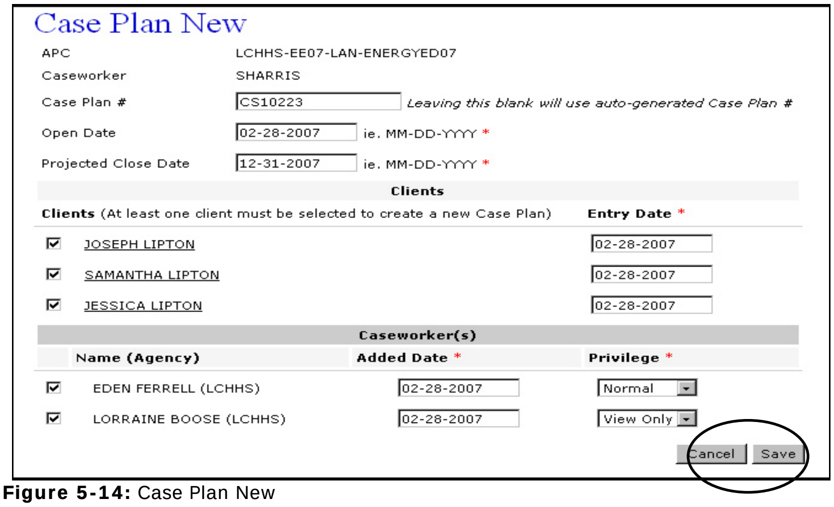


Figure 5-14: Case Plan New

Case Plan View

The ‘Case Plan View’ screen provides an overview of all the clients enrolled in the case plan. The case workers assigned and their privilege level such as owner, normal or view only access.

The next step in developing a case plan may include creating an “Action Plan” that works towards a specific goal for a household such as assisting them with classes, finding employment, etc. Before an ‘Action Plan’ is developed, it is important to know where the household is starting from. A status assessment is important and is needed as part of analyzing a starting point and where the goal completion end is that the household/client should be working towards.

2. On ‘Case Plan New’ click the ‘Save’ button *(Figure 5-14, above)*. The ‘Case Plan View’ screen will appear next *(see Figure 5-15)*.

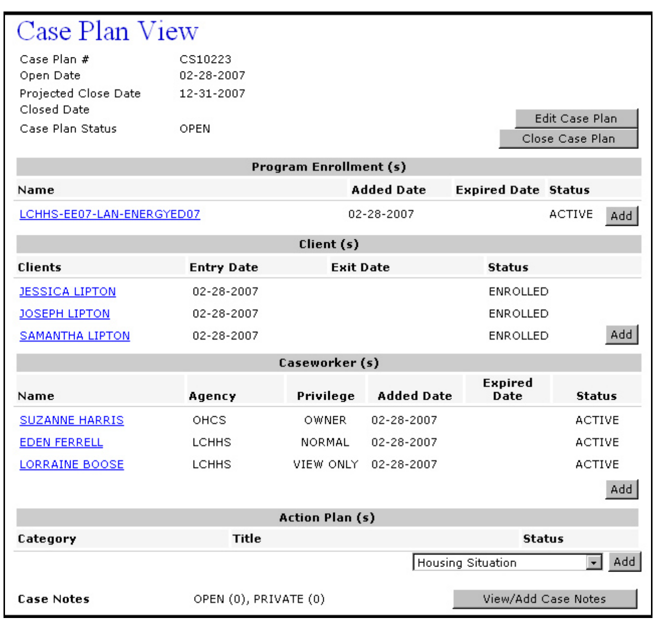


Figure 5-15: Case Plan View

Status Assessment

As part of a case plan, a household needs to go through an initial assessment of where they stand with a number of indicators from housing, food access, energy, etc.

1. There are two ways to get to the program summary screen. Go to the left Navigation bar under Enrollment, click on 'Program Summary' screen or go to the Top Navigation Bar and scroll the mouse over the 'Program', go to 'Enrollment', click on 'Summary'. You should now see the Status Assessments on the Left Nav Bar (see Figure 5-16a).

The second way is: in client search, click on the client's name, this will go to 'household view, click on the specific 'program enrolled' and the household transaction summary screen will appear. Scroll to "Program', 'Enrollment' to 'Summary'. Click on 'Program Summary' and 'Program Enrollment Summary' will appear.

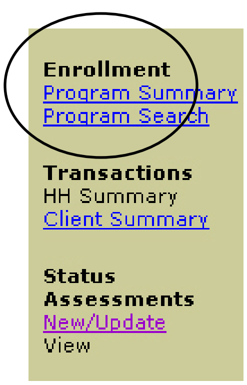


Figure 5-16: Left Nav Bar

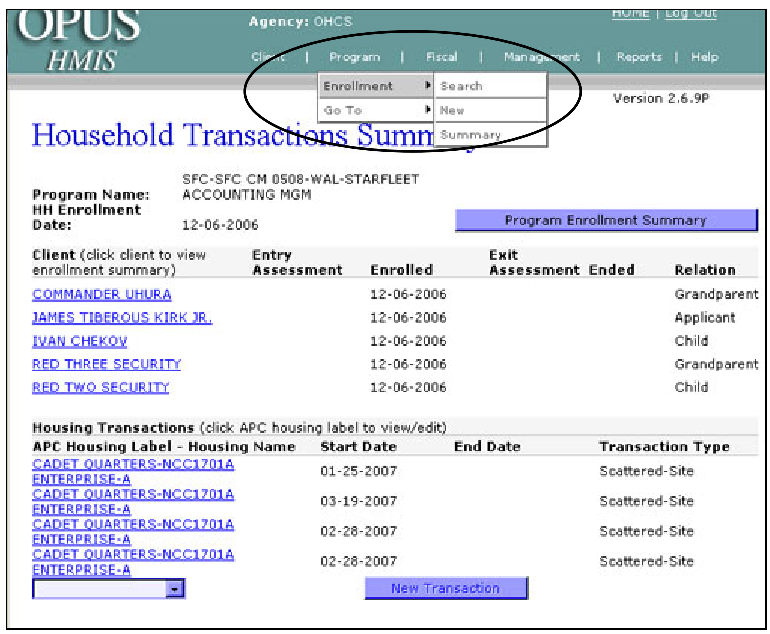
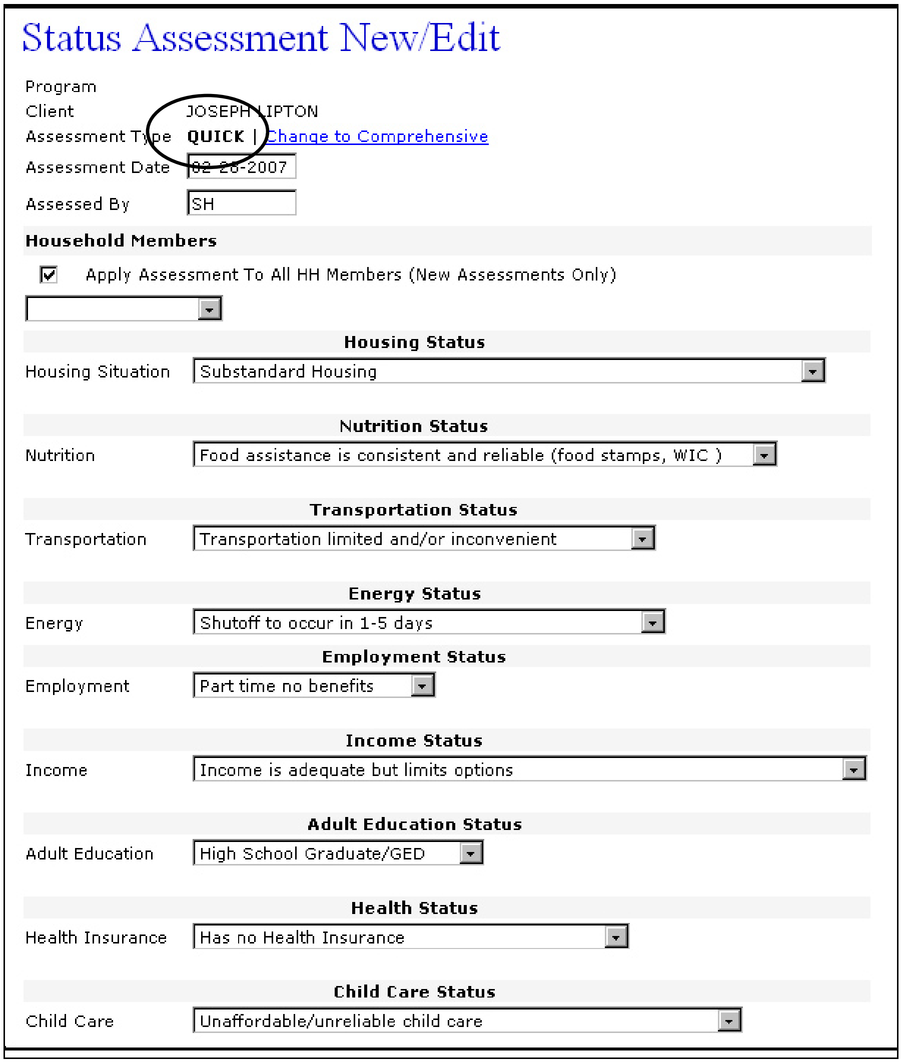


Figure 5-16a: Top Nav Bar

2. Click the link titled New/Update. The Status Assessment New/Edit screen will appear next *(Figure 5-17)*. By selecting the fields on this form, the household is analyzed for an initial assessment that can later be looked at for a comparison of when they came into the program versus their assessment when they exited the program.



Status Assessment New/Edit

Program
Client JOSEPH LIPTON
Assessment Type **QUICK** | Change to Comprehensive
Assessment Date 02-26-2007
Assessed By SH

Household Members

☑ Apply Assessment To All HH Members (New Assessments Only)

Housing Status
Housing Situation: Substandard Housing

Nutrition Status
Nutrition: Food assistance is consistent and reliable (food stamps, WIC)

Transportation Status
Transportation: Transportation limited and/or inconvenient

Energy Status
Energy: Shutoff to occur in 1-5 days

Employment Status
Employment: Part time no benefits

Income Status
Income: Income is adequate but limits options

Adult Education Status
Adult Education: High School Graduate/GED

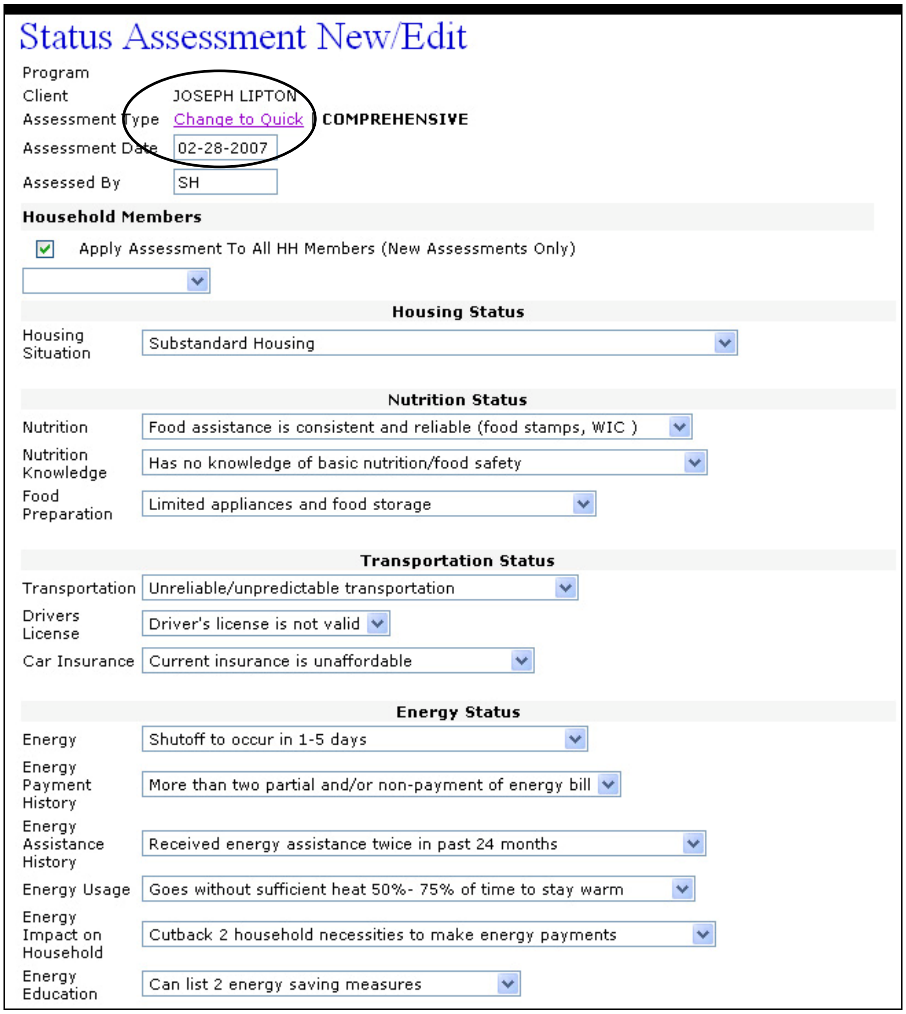
Health Status
Health Insurance: Has no Health Insurance

Child Care Status
Child Care: Unaffordable/unreliable child care

Figure 5-17: Status Assessment New/Edit (Quick)

3. There are two assessments: 'Quick' and 'Comprehensive'. The quick assessment is simply a condensed version of the comprehensive plan and is good to use as a screening tool to help decide whether a households' needs can be served by either level 2 or level 3 case management services.

If you want to use the quick assessment *(Figure 5-17)*, simply click on 'Change to Quick' and fill in the 'Assessment Date'. If the date and 'Assessed By' is incorrect, it can be edited to be correct. Check the box if the assessment relates to all household members or select the appropriate members from the drop down box. Select the appropriate indicator for each assessment category and click 'Save' when done.



Status Assessment New/Edit

Program

Client JOSEPH LIPTON

Assessment Type Change to Quick | COMPREHENSIVE

Assessment Date 02-28-2007

Assessed By SH

Household Members

Apply Assessment To All HH Members (New Assessments Only)

Housing Status

Housing Situation	Substandard Housing

Nutrition Status

Nutrition	Food assistance is consistent and reliable (food stamps, WIC)
Nutrition Knowledge	Has no knowledge of basic nutrition/food safety
Food Preparation	Limited appliances and food storage

Transportation Status

Transportation	Unreliable/unpredictable transportation
Drivers License	Driver's license is not valid
Car Insurance	Current insurance is unaffordable

Energy Status

Energy	Shutoff to occur in 1-5 days
Energy Payment History	More than two partial and/or non-payment of energy bill
Energy Assistance History	Received energy assistance twice in past 24 months
Energy Usage	Goes without sufficient heat 50%- 75% of time to stay warm
Energy Impact on Household	Cutback 2 household necessities to make energy payments
Energy Education	Can list 2 energy saving measures

Figure 5-17: Status Assessment New/Edit (Quick)

Note: If a quick assessment had been completed earlier, those indicators will be filled in on the comprehensive assessment. Click the 'Save' button when done.

4. To complete the comprehensive assessment, which is required for anyone entering level 3 case management, click on 'Change to Comprehensive' at the top of the assessment tool. In this assessment *(Figure 5-18)* under categories, there are sub-categories. An indicator should be selected for each sub-category.

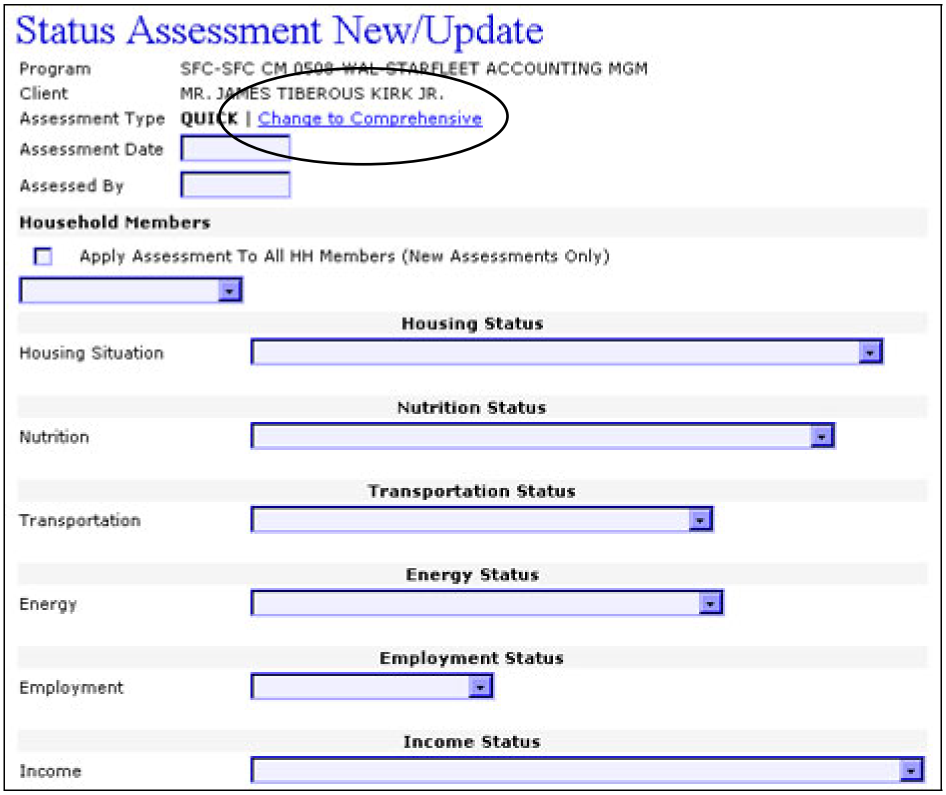


Figure 5-18: Change to Comprehensive

5. The Status Assessment View screen will appear after completion of each assessment *(see Figure 5-19)*.

Status Assessment View

Program
Client JOSEPH LIPTON

Housing Status	
Housing Situation	
02-28-2007	Substandard Housing
Nutrition Status	
Nutrition	
02-28-2007	Food assistance is consistent and reliable (food stamps, WIC)
Nutrition Knowledge	
02-28-2007	Has no knowledge of basic nutrition/food safety
Food Preparation	
02-28-2007	Limited appliances and food storage
Transportation Status	
Transportation	
02-28-2007	Unreliable/unpredictable transportation
Drivers License	
02-28-2007	Driver's license is not valid
Car Insurance	
02-28-2007	Current insurance is unaffordable
Energy Status	
Energy	
02-28-2007	Shutoff to occur in 1-5 days
Energy Payment History	
02-28-2007	More than two partial and/or non-payment of energy bill
Energy Assistance History	
02-28-2007	Received energy assistance twice in past 24 months
Energy Usage	
02-28-2007	Goes without sufficient heat 50%- 75% of time to stay warm
Energy Impact on Household	
02-28-2007	Cutback 2 household necessities to make energy payments
Energy Education	
02-28-2007	Can list 2 energy saving measures
Employment Status	
Employment	
02-28-2007	Part time no benefits
Employment Skills	
02-28-2007	Limited basic or marketable skills
Job Retention	
02-28-2007	Maintains employment between one and three months

Figure 5-19: Status Assessment View, part 1

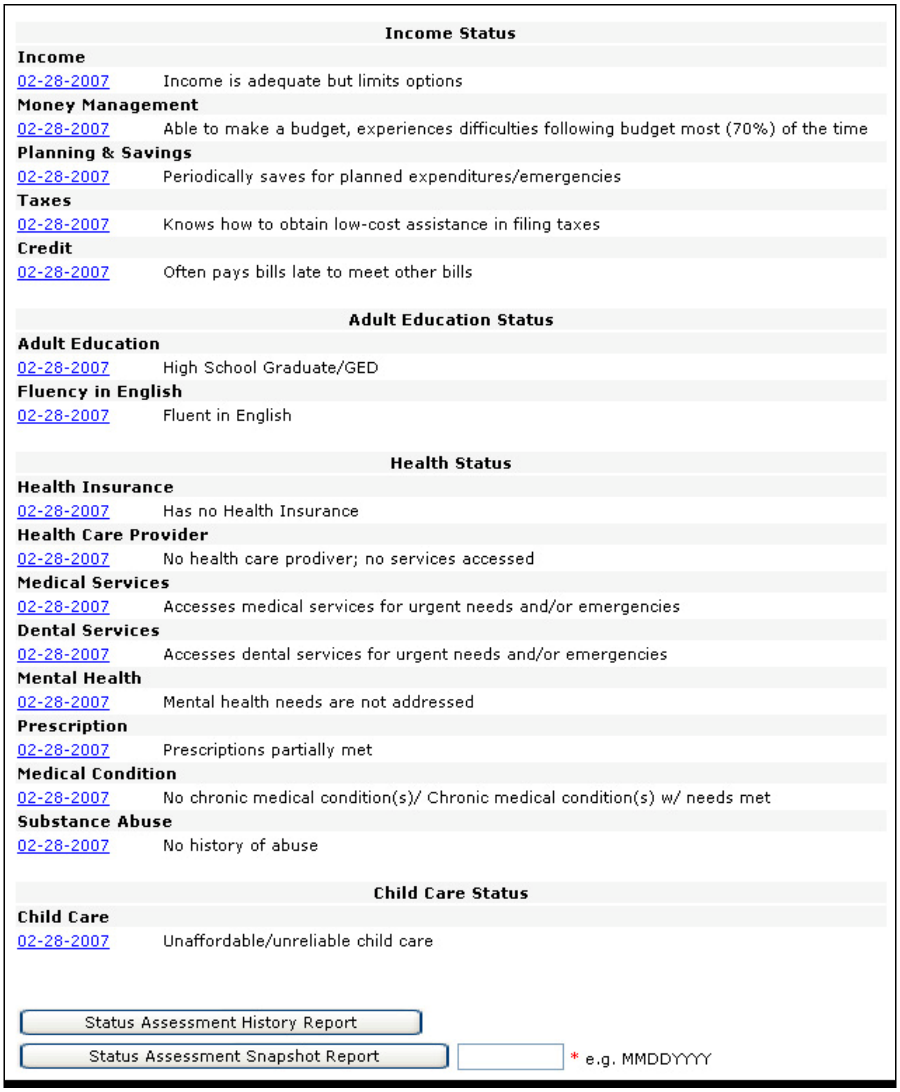


Figure 5-19: Status Assessment View, part 2

6. At the bottom of the Status Assessment View *(Figure 5-19)*, you will see two buttons. The first, 'Status Assessment History Report' will provide you a printable report that shows the selected assessment indicators including any changes made since the initial assessment. The second, 'Status Assessment Snapshot Report', allows you to enter a date and the report will show the status of the client's assessment as of the selected date.

7. Before exiting a client from case management, the comprehensive assessment must be updated so it reflects the status in each sub-category at the point of exiting.

8. On the Left Nav, under Enrollment, click the Program Summary link to return to the section of the Case Plan. Under 'Case Plans', you may either select the case plan created earlier by clicking on the number or click on New Case Plan.

Action Plan

Once the ‘Case Plan’ has been started, it can continue into the action plan phase. An ‘Action Plan’ may include: ‘Action Steps’ that outline the expectations or steps that a client and case manager may take to help a household achieve their goals in the respective categories. Multiple action plans may be created. To begin an action plan, the user starts from the ‘Case Plan View’ screen *(Figure 5-20)*. At the bottom of the screen, locate the section called ‘Action Plan’, select a category and click the Add button to begin a new action plan.

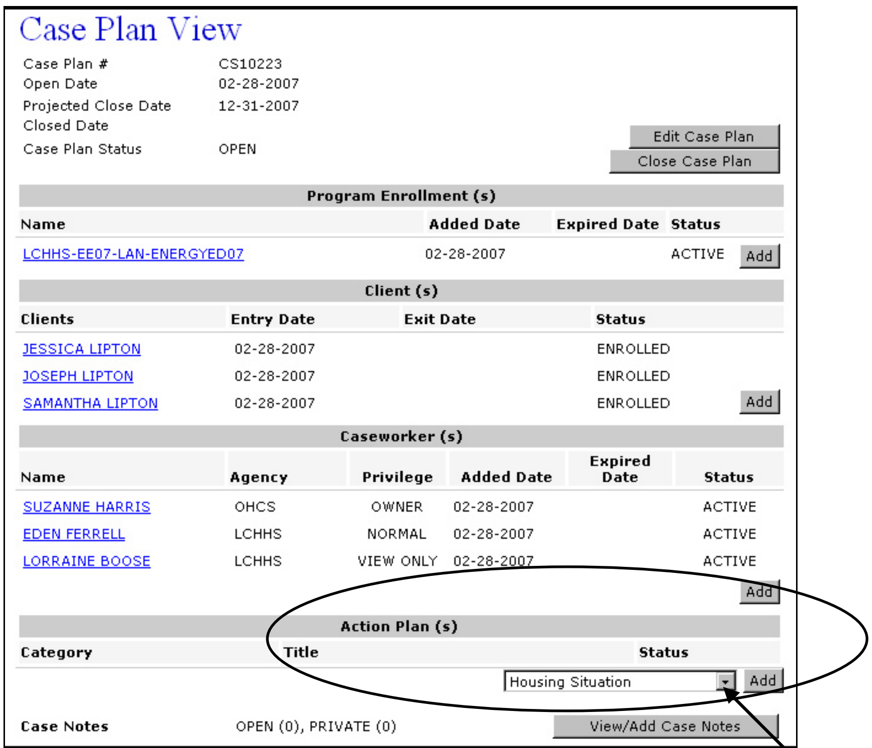


Figure 5-20: Case Plan View screen – Add button for Action Plan.

Action Plan New

1. On the Action Plan New screen *(Figure 5-21)*, enter an 'Action Plan Title' and select from the available fields: 'Entry Level' status is the assessment indicator selected at the point of entry into case management. The 'Target Goal' must be higher than the entry level status and represent the target for achievement for this action plan. The 'Open Date' is when this action plan was started and 'Projected Close Date' is the target date the client sets to have achieved the target goal. A 'Date Tickler' can be selected if you would like to be reminded by the OPUS System when the projected close date is approaching. Select the clients that will be associated with the action plan and click the Save button. The Action Plan View screen will appear next *(Figure 5-22)*.

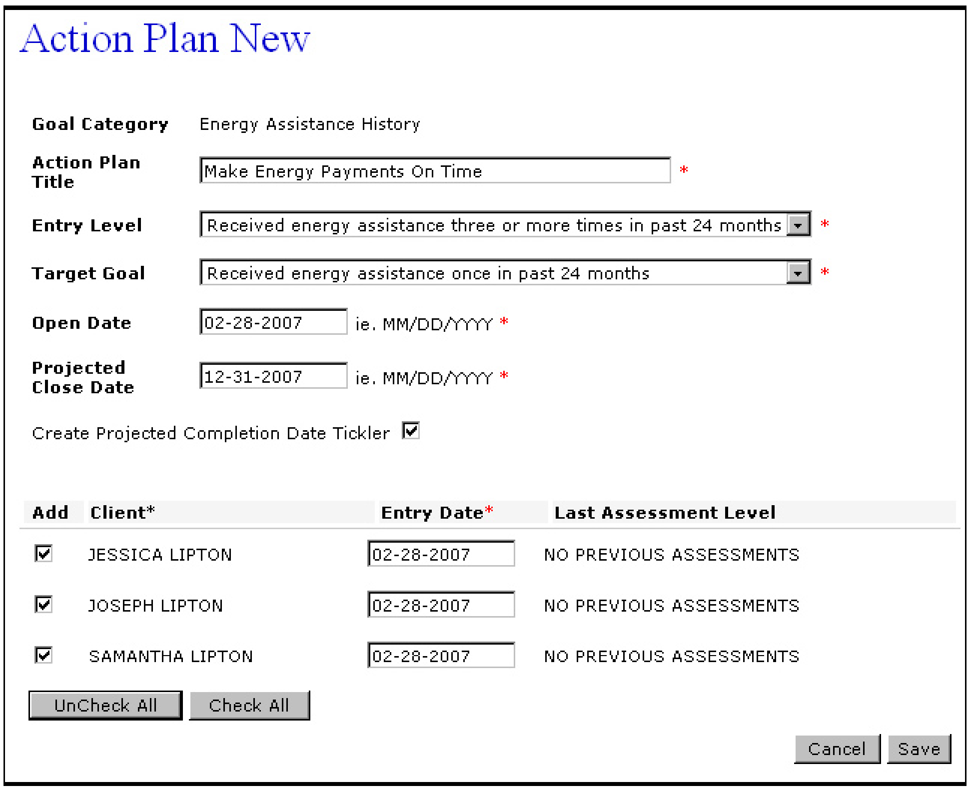


Figure 5-21: Action Plan New screen

Action Plan View

The 'Action Plan View' screen provides several areas to work from *(Figure 5-22)*. This is where the plan can be edited, built upon with action steps, case notes viewed or created and then eventually closed upon completion. The next section will provide procedures to create action steps to support an action plan.

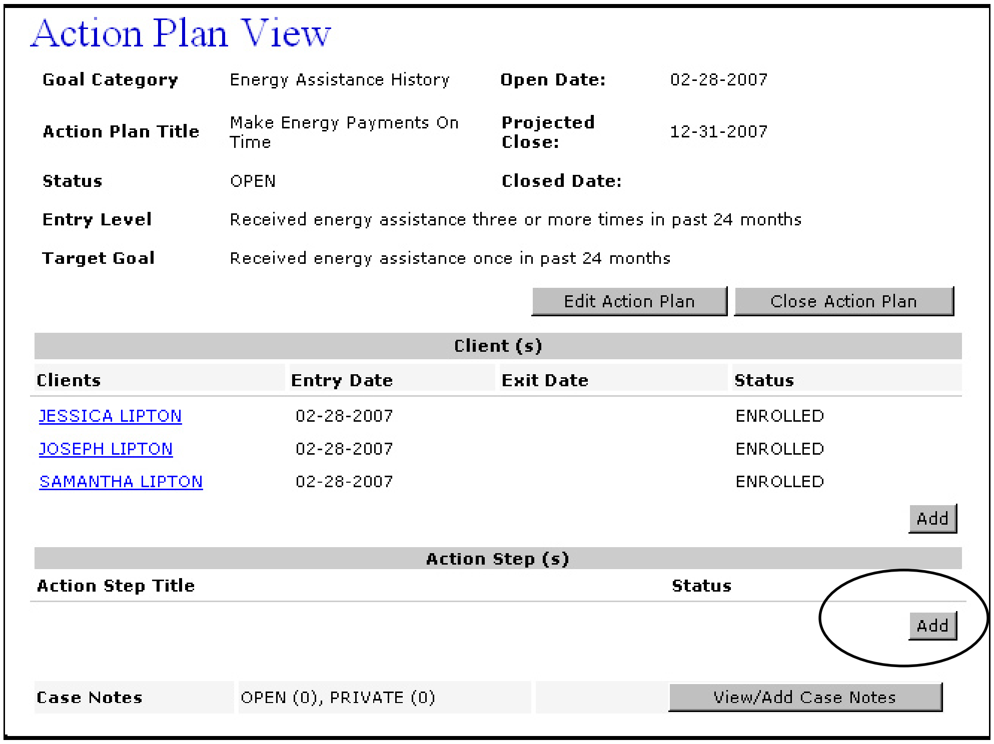


Figure 5-22: Action Plan View screen.

Action Steps

Action Steps support an action plan. At the bottom of the 'Action Plan View' screen *(Figure 5-22)* is the Action Step area. Click the "Add" button to add an action step for this action plan.

Action Step New

On the 'Action Step New' screen *(Figure 5-23)*, fill in all relevant action step fields. All fields marked with * are required.

- 'Roles' further define what the action step is.

- 'Responsibility' defines what the client has agreed to do to complete the action step.

- 'Support Services' lists any services the agency may provide to assist the client in achieving this action step.

- ‘Referral’ lists any referrals made to assist the client related to this action step.
- ‘Comments’ can be used to further explain the above information or to record information that may be important to help the client be successful in this action.
- ‘Action Step Status’ is used to identify this step as ‘Open’, meaning the client is actively working on this step, or ‘Planned’, which means the step is planned for the future. This is helpful if there are a series of steps that need to be completed sequentially.

Click the ‘Save’ button. If more than one step is needed for the action plan, simply click the “Add” button again on the Action Plan screen and add another action step. Each step should have its own unique title.

Figure 5-23: Action Step New screen.

Action Step View

Once an 'Action Step New' or 'Edit' screen has been completed, the 'Action Step View' screen *(Figure 5-24)* will appear. At the bottom of the screen, you can add 'Case Notes' specific to the action step. Click the button 'View/Add Case Notes', the screen Case Notes Summary View will appear next *(Figure 5-25)*.

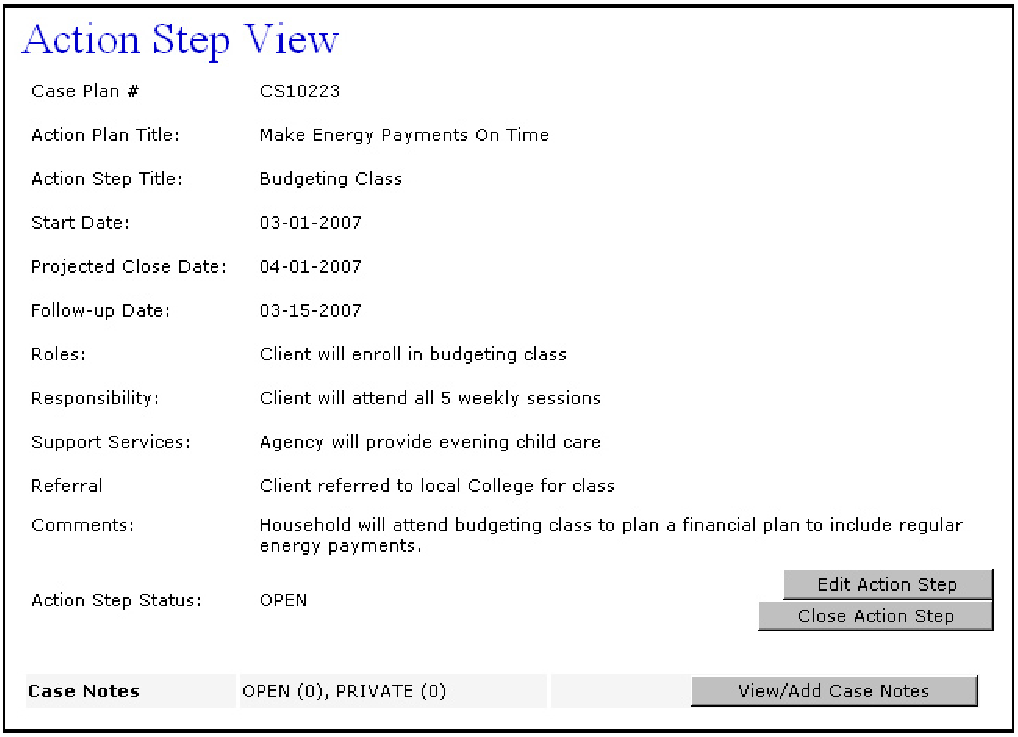


Figure 5-24: Action Step View

Case Notes Summary View

If a case plan is new or in-active, there may not be any current case notes displayed *(Figure 5-25)*. If there are case notes, they will be listed by owner and date with links to them so the case worker can read them based on their access privilege *(Figure 5-27)*. Click the “Add” button, and the Case Notes New screen will appear next *(Figure 5-26)*.

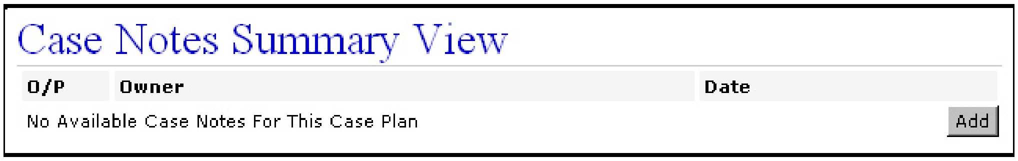


Figure 5-25: Case Notes Summary View and New

Case Notes New

On the ‘Case Notes New’ screen, enter all relevant fields. The last field is the Notes “Set Notes Security” status. Select either ‘Open’ or ‘Closed’. If it’s marked as “Closed”, then only the user that created the case note for the household will be able to view that record. If it is marked “Open”, all users with privilege access to the household case plan will have access to the “open” case notes as well. Consider the sensitivity of the information in determining whether to select closed or open.

Click the save button and the ‘Case Notes Summary View’ screen will appear *(Figure 5-27)*. To add another note, click the “Add” button and repeat the above steps.

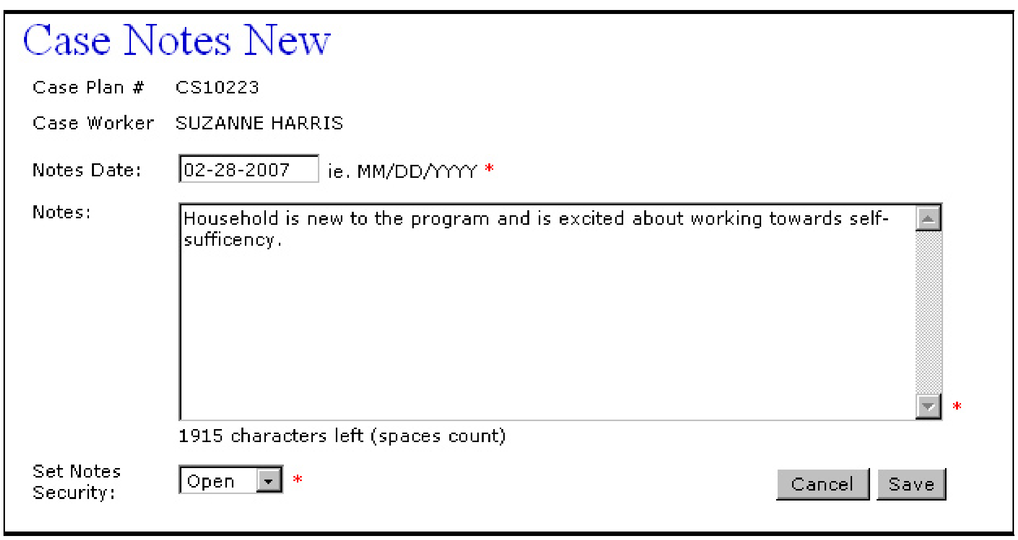


Figure 5-26: Case Notes Summary View and New

After completing the ‘Case Notes New’ screen, the ‘Case Notes Summary View’ will appear with the list of notes sorted by date. The date is provided as a link to view each individually.

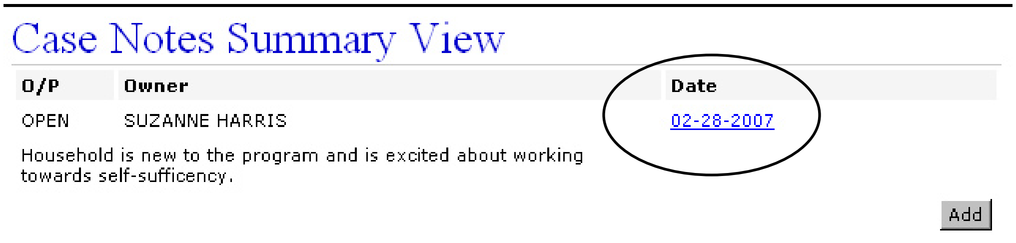


Figure 5-27: Case Notes Summary View

How to Navigate through Case Plan Screens

A case worker can navigate to any part of a case plan, an action plan or action step screen by using the top Main Menu of OPUS. Scroll the mouse over “Case Mgmt” *(Figure 5-28)* and a drop-down menu of case management options will appear, click the one to view.

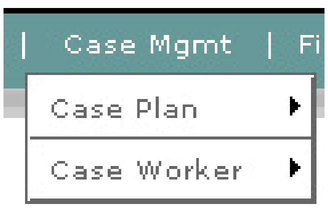


Figure 5-28: Main Menu – Case Management drop-down menu.

On the Left Navigation Bar, there are more options to use for a case plan in the OPUS system *(see Figure 5-29)*. The ‘Left Nav Bar’ changes depending on which screen you are in, so if yours looks different note the options as you change screens.

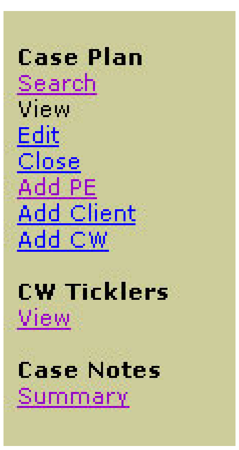


Figure 5-29: Left Nav Bar – Case Plan screens

Adding a case worker from another agency

You may want to add a case worker from another agency to work on a specific case plan. It is assumed that you have communicated with this case worker and they are aware you will open a case plan to their access.

Setup:

Case Worker to be invited:

You are logged into OPUS and are looking at the message of the day screen.

1. Go to 'Case Mgmt' on the main menu, scroll down to 'Case Worker', and select 'Status'. Then the 'Manage Case Worker Status' screen *(see figure 5-30)* will appear.

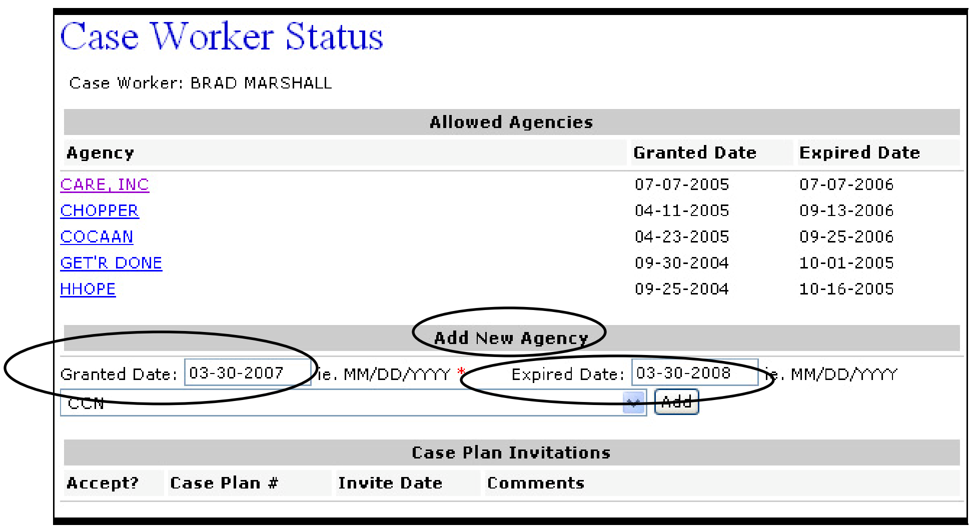


Figure 5-30: Case Worker Status

2. Go to 'Add New Agency' and select the agency in the drop down menu, then enter 'Granted Date' and 'Expired Date' and click 'Add'. You will see the agency added to the list of 'Allowed Agencies'.

Note: If you want to edit this permission, you can click on the added agency and the 'Edit' screen will appear.

Owner of case plan:

1. Go to the 'Case Plan - View' to the Caseworker(s) section and click Add. You will see your agency staff that have been given privileges to access the HMIS module and other agency staff that made themselves visible to your agency. *(See figure 5-31)*.

2. Check the appropriate person, enter the 'Added Date' and set the privilege level (remember, if you assign the person as an owner, they will have full rights, just as you do). Click 'Save'. This will take you back to the 'Case Plan View' and you will see the person listed under Case Worker(s) and with their status listed as "Invited."

3. Notify the case worker that you have granted them OPUS access to the client's case plan. The new agency case manager may now go into OPUS and work with the client through the HMIS module in the case plan made for that client.

Case Worker to be invited:

1. Go to 'Case Worker Status' screen *(Figure 5-31)*. Check the box to accept (This line shows the Case Plan #, Invitee Date and Comment). Click the 'Add' button to accept.

2. At this point, the invited case worker has access to the case plan.

Note: The invited case worker can edit their 'Expired Date' to make themselves no longer visible to other agencies to access case plans. The owner may edit an expired date to bar access to any case worker they have previously invited.

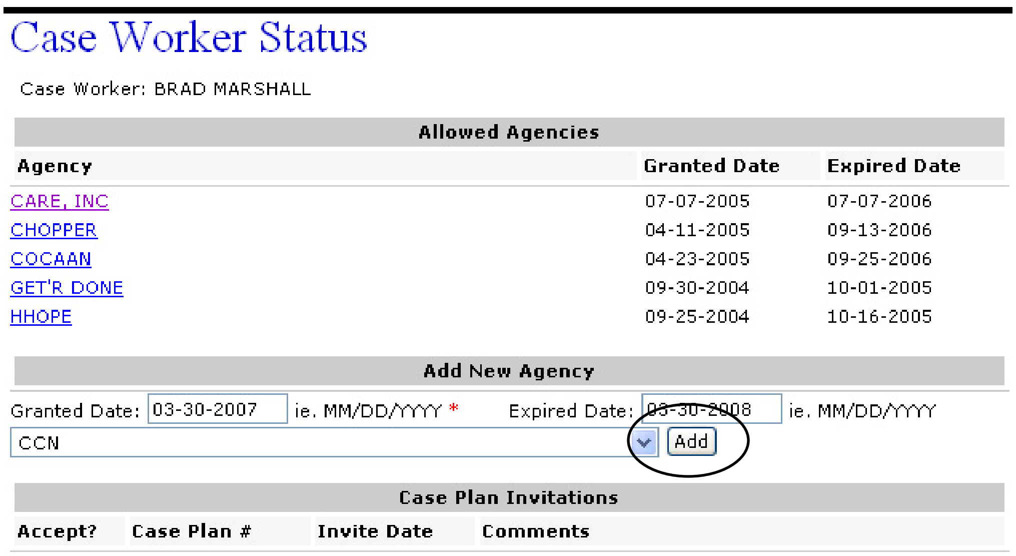


Figure 5-31: Case Worker Status

Case Worker Tickler System

Case workers can set an alert tickler for action plans and action steps. Both the 'Action Plan New' and 'Action Step New' screens have check boxes to select so that a case worker can be reminded to follow up on specific plans and steps.

When the tickler system has been implemented and a case worker logs into the OPUS system, the message alert box will pop-up *(see Figure 5-32)* on the 'Message of the Day' screen to remind them of items in the tickler list that need to be reviewed.

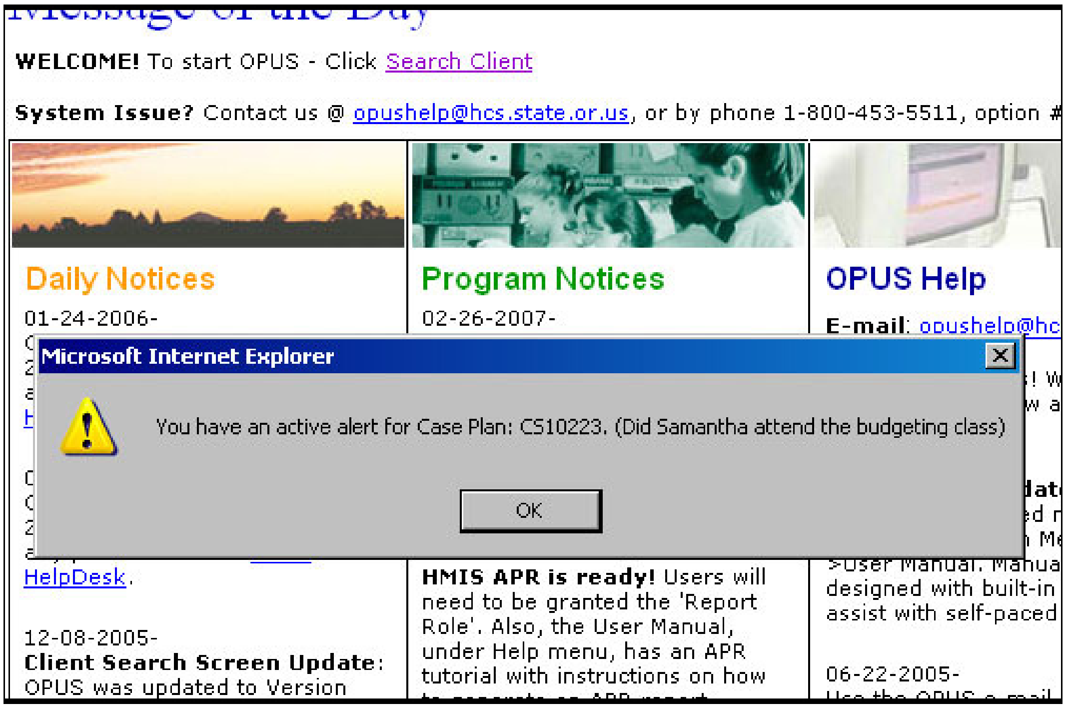


Figure 5-32: Case Worker Tickler Alert

Click on the ‘OK’ button to access the tickler list. On the main menu, scroll the mouse over the ‘Case Mgmt’, over ‘Caseworker’ and click on ‘View Ticklers’ menu item. The ‘Case Worker Tickler View’ screen will appear *(Figure 5-33)*. Click on the ‘Case Plan #’ that you want to review.

Each check mark in a ‘Flag’ column indicates that a case worker selects to be reminded. If you unselect the ‘Flag’, you will de-activate the reminder pop-up message box. You may unselect the ticklers individually or click the ‘UnCheck All’ button, then click the “Update Flag(s)” button. To remove a tickler permanently, make sure it is not checked then click on ‘Delete Disabled Ticklers’.

A case worker can start a new tickler from this screen by clicking the “New Tickler” button.

Figure 5-33: Case Worker Tickler View

M1 Section

User Role and Permission Setup

A manager can create user accounts in OPUS. He/she sets up the roles and actions to be performed by users depending on what job functions they need to work on in OPUS. Some users only need 'View Only' access, some need to process client intakes, and others need more access for reports, and/or management functions.

User Search

The ‘User Search’ Screen allows one to search for a person who is registered in the system. To search, follow the steps below.

Setup: You are on the Message of the Day screen.

1. On the top main menu, scroll the mouse over ‘Management’ where the drop down menu will appear and click on ‘User’ *(see Figure M1-1)*. The ‘User Search’ screen will appear next *(see Figure M1-2)*.

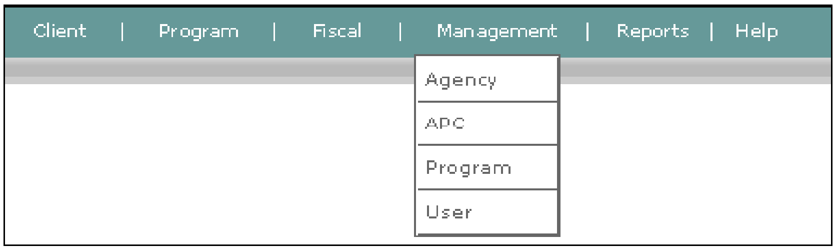


Figure M1-1: Main Menu - Management

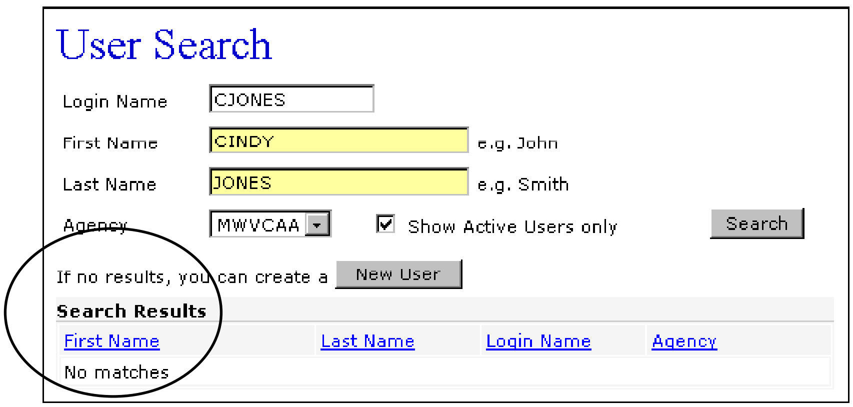


Figure M1-2: User Search screen

2. Enter any of the fields to search for a user. Click the ‘Search’ button.

3. No matches were found in the database *(see Figure M1-1)*. A manager can now create a new user, which will be explained next.

User New

The User New Screen allows a manager to create a new user in the OPUS System.

Setup: You are on the 'User Search' screen *(see Figure M1-3)*.

1. Click on the 'New User' button. Complete all required fields (fields marked * are required, *see figure M1-4*).

- **a.** User name. **Note:** Refer to the user name and password requirements
- **b.** First Name
- **c.** Last Name
- **d.** Middle Name (optional)
- **e.** Initials
- **f.** Title
- **h.** E-mail. **Note**: OHCS communicates regularly with announcements with OPUS users via e-mail. Make sure the e-mail address is correct.
- **i.** Phone and Ext
- **j.** Agency
- **k.** Click the "Save" button. The 'User View' screen will appear *(see Figure M1-5)*.

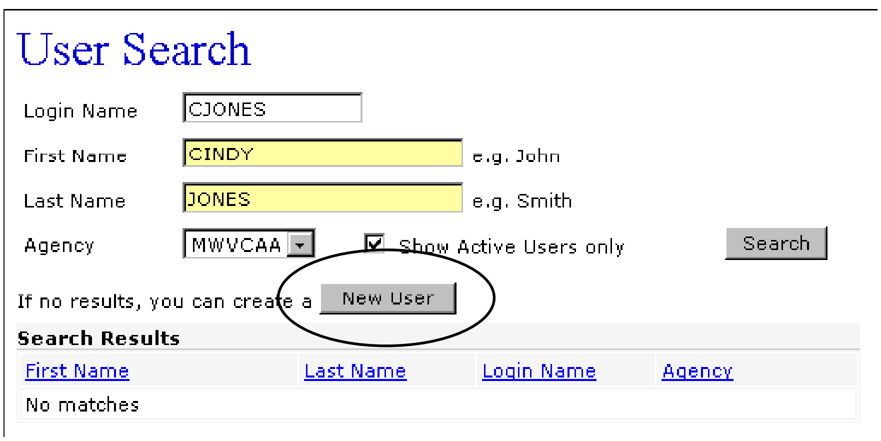


Figure M1-3: User Search screen

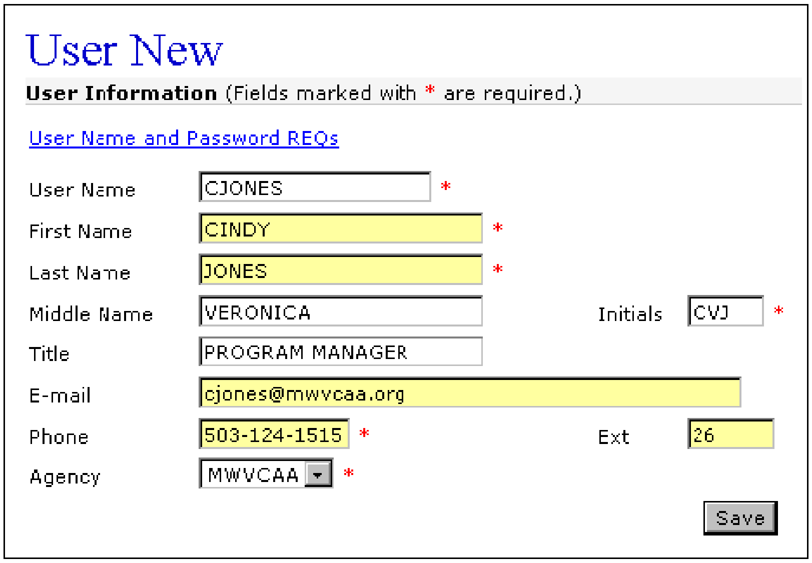


Figure M1-4: User New screen

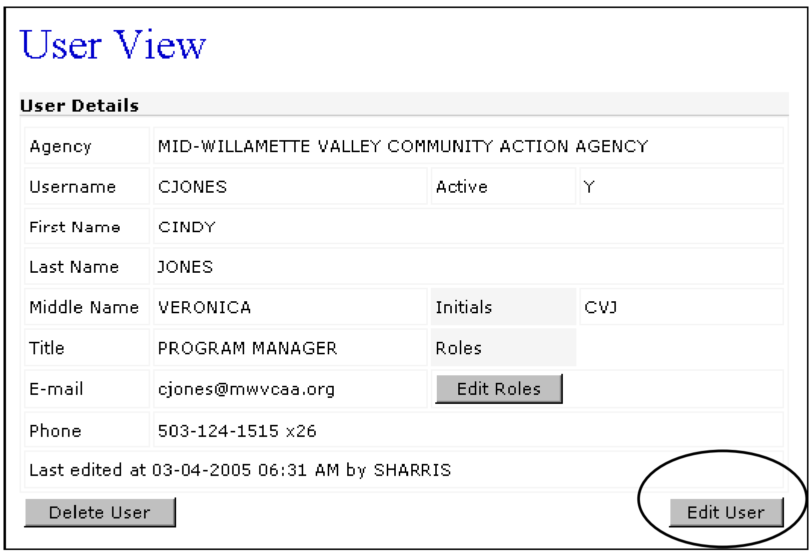


Figure M1-5: User View screen before Roles assigned.

User View

The 'User View' screen allows a manager to view individual user screens to view permission level, user name, phone number and email address. To edit information, a manager will click the 'Edit User' button (bottom right-side). The 'User View' screen allows one to review the role level and permissions that a user has been assigned. If a user was just created, the person doesn't have roles assigned. The manager will need to proceed and assign roles and set permissions for the user.

To assign roles click the ‘Edit Roles’ button *(see Figure M1-6)*. The ‘User Role Edit’ screen will appear next *(see Figure M1-7)*.

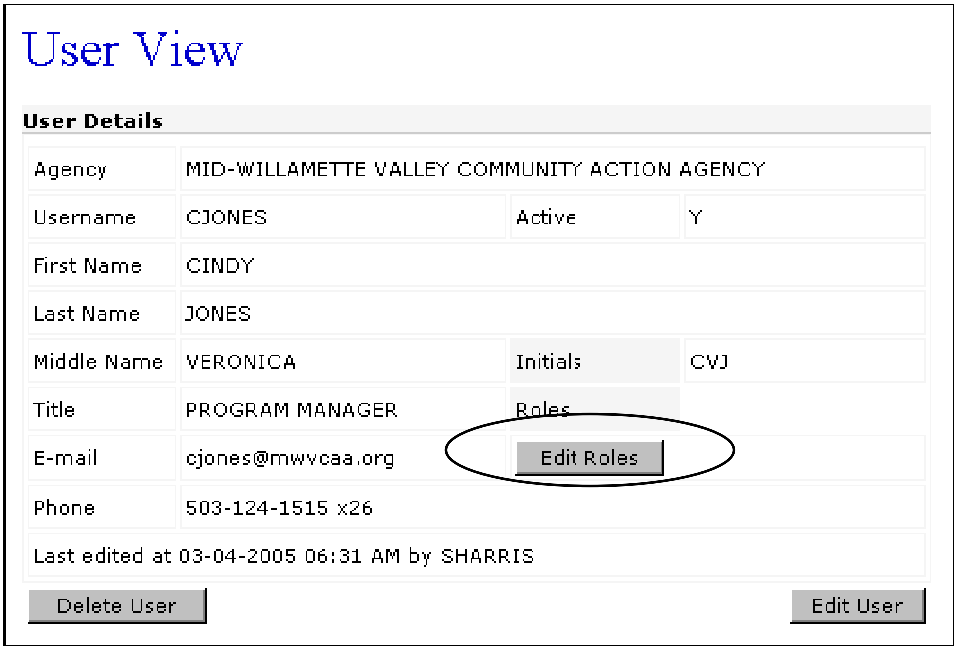


Figure M1-6: User View screen before Roles assigned.

Note: This is the 1st of two steps in establishing screen permissions for a user. Each role has a default set of actions set to ‘Allow’. It will be explained in the next section how to customize actions within roles. These steps are used to edit roles for users *(refer to ‘User Role Edit’ page 7)*.

To assign actions for a user, click on ‘Edit Actions’ and the box will become checked. Click ‘Update’ to save.

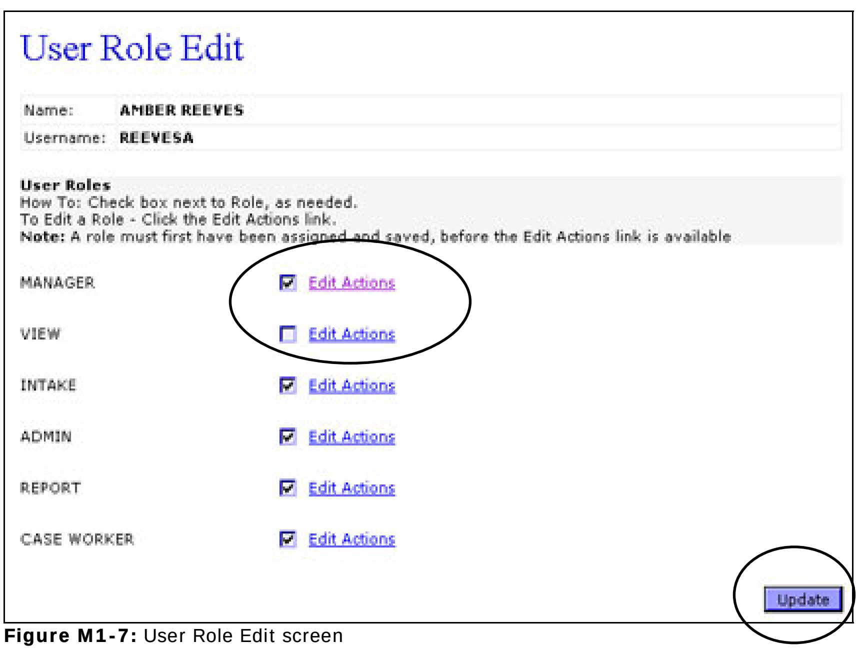


Figure M1-7: User Role Edit screen

To assign actions, click on 'Edit Actions'. The 'User Role Action Edit' screen will appear *(see Figure M1-8)*. Click on the appropriate action for 'Allow' or 'Deny' required for the user.

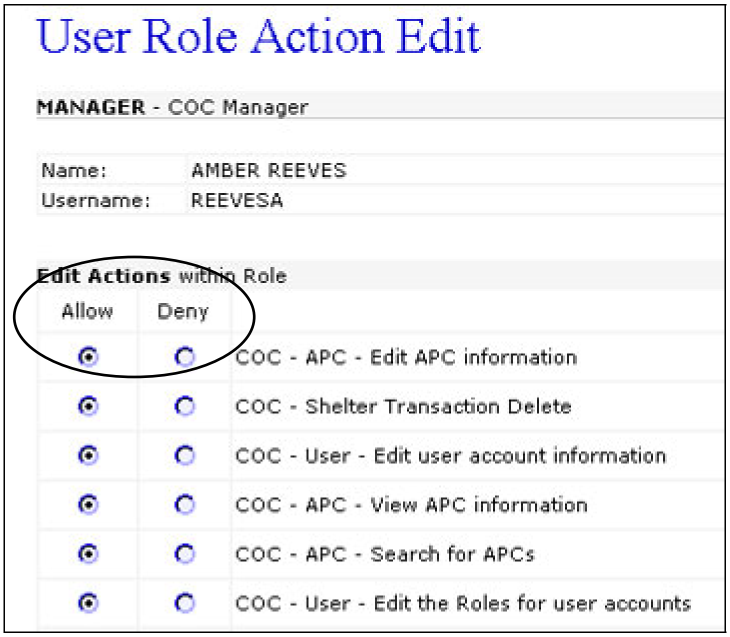


Figure M 1-8: User Role Action Edit.

Click 'Save' at the bottom of the 'User Role Action Edit' screen when complete assigning roles *(see Figure M 1-8a)*.

Figure M 1-8a: User Role action Edit 'save' button.

Delete User

To cancel a user's account, a manager will click the 'Delete User' button at the bottom left side of 'User View' screen (*see Figure M1-9*).

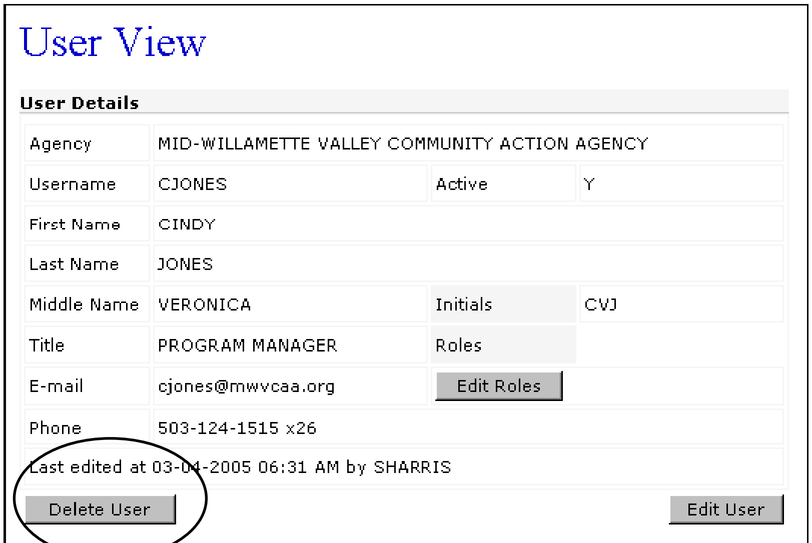


Figure M 1-9: Delete User

User Role Edit

Managers are allowed to adjust roles and actions access for each user on a 'per screen' basis in the 'User Role Edit' screen.

Setup: You are on the User View screen.

1. Click the 'Edit Roles' button in the middle of the screen *(see Figure M1-10)*.

Figure M1-10: User View screen before Roles assigned.

2. On the ‘User Role Edit’ screen, click on the roles that the user needs then click ‘Update’ *(see Figure M1-11)*.

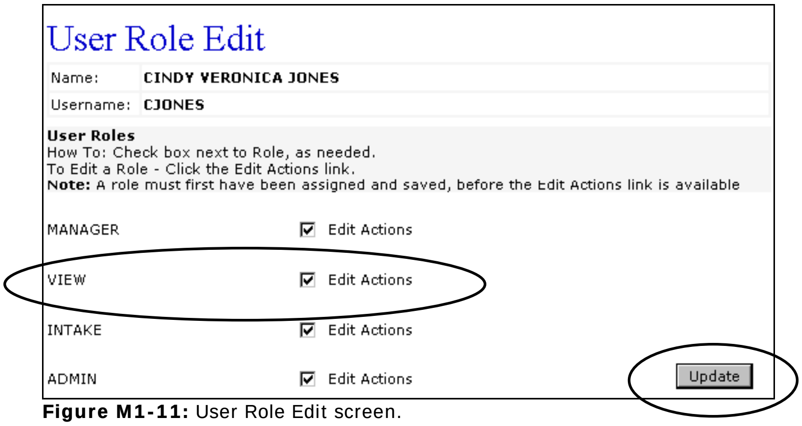


Figure M1-11: User Role Edit screen.

Note: As stated on page 5 under ‘New User’, this is the 1st of two steps in establishing screen permissions for a user. Each role has a default set of actions set to ‘Allow’. It will be explained in the next section how to customize actions within roles.

3. Click the “Update” button. The ‘User View’ screen will appear next *(see Figure M1-12)*. Notice the user’s roles listed. This completes Step 1. If the user needs all the default permissions associated with a given role, then you don’t need to go any further than this step. When user roles need to be customized further, such as restrictions to specific screens within a specific role, you will learn to customize this in the next section title, ‘User Action Edit’.

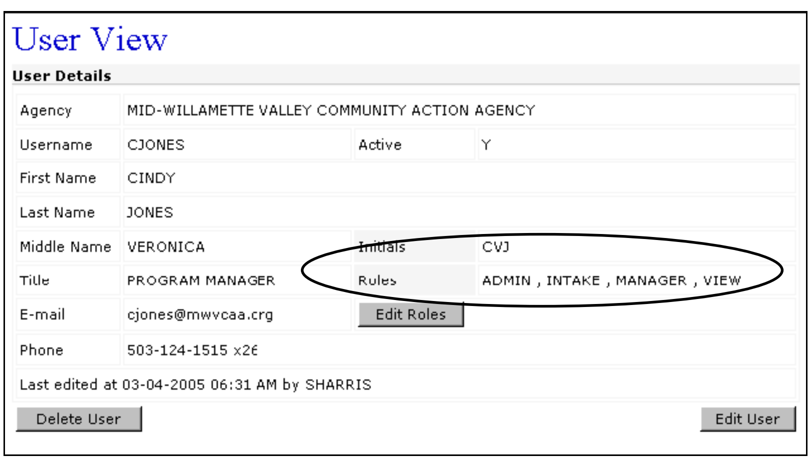


Figure M1-12: User View screen.

User Action Edit

Working from the last section, you can proceed to customize the default actions for each role, as needed.

1. On the 'User View' screen, click the 'Edit Roles' button again *(see Figure M1-13)*.

Figure M1-13: User View screen with roles listed

2. The User Role Edit screen will appear, and this time each role that was previously assigned has a checked box next to it.

3. Next to each checked box, there will be blue-underlined 'Edit Actions' links *(see Figure M1-12)*.

4. Click one of the Edit Actions link next to a role to customize *(see Figure M1-12)*. The User Action Edit screen will appear next.

Figure M1-12: User Role Edit screen

5. On the 'User Action Edit 'screen, by default, all the actions for a role are selected to allow access to the users.

6. Select the appropriate action for each role that the user needs, either ‘Allow’ or “deny” *(see Figure M1-13)*.

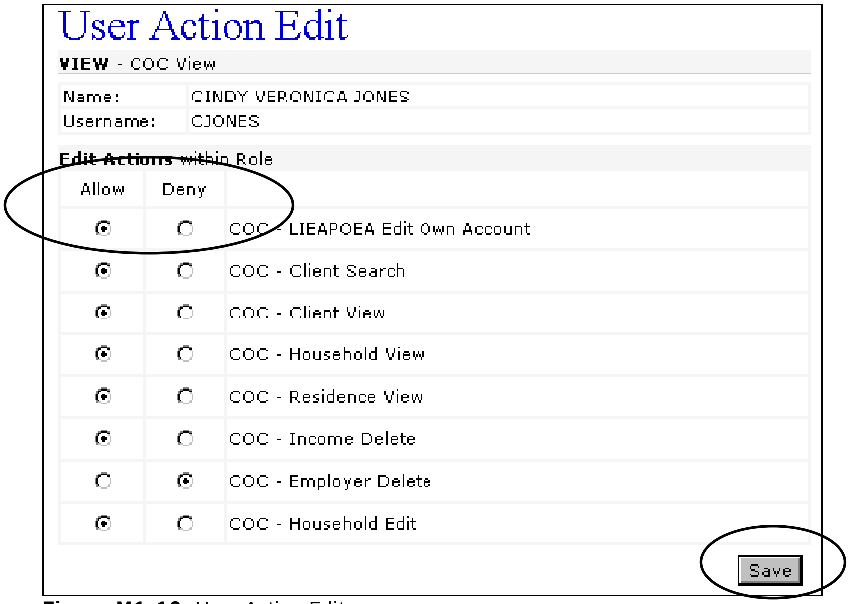


Figure M1-13: User Action Edit

7. Click the “Save” button. The User Role Edit screen will appear next. If you need to customize a different role for this user, repeat Steps M1-7 above. On the following pages, Figures M1-14 through M1-17, the User Action Edit options are displayed for each of the HMIS-CoC roles.

User Action Edit - Manager

Figure M1-14, the “User Action Edit’ options are displayed for the Manager role.

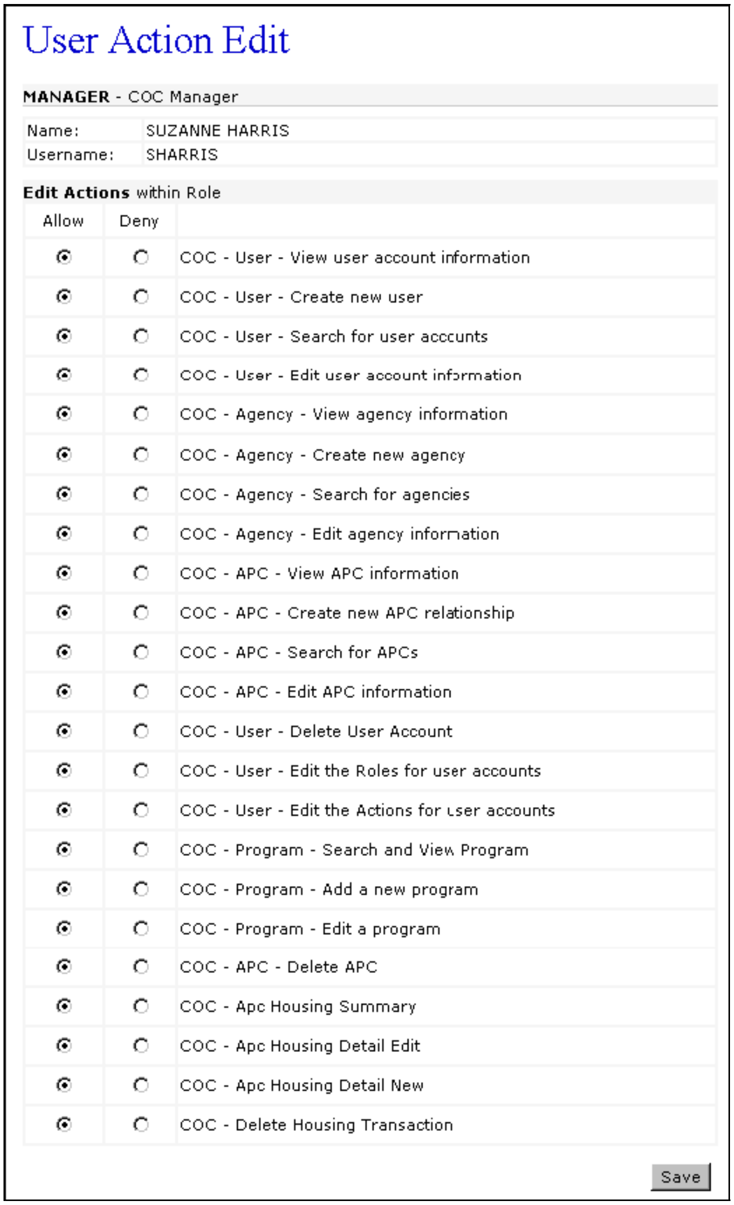
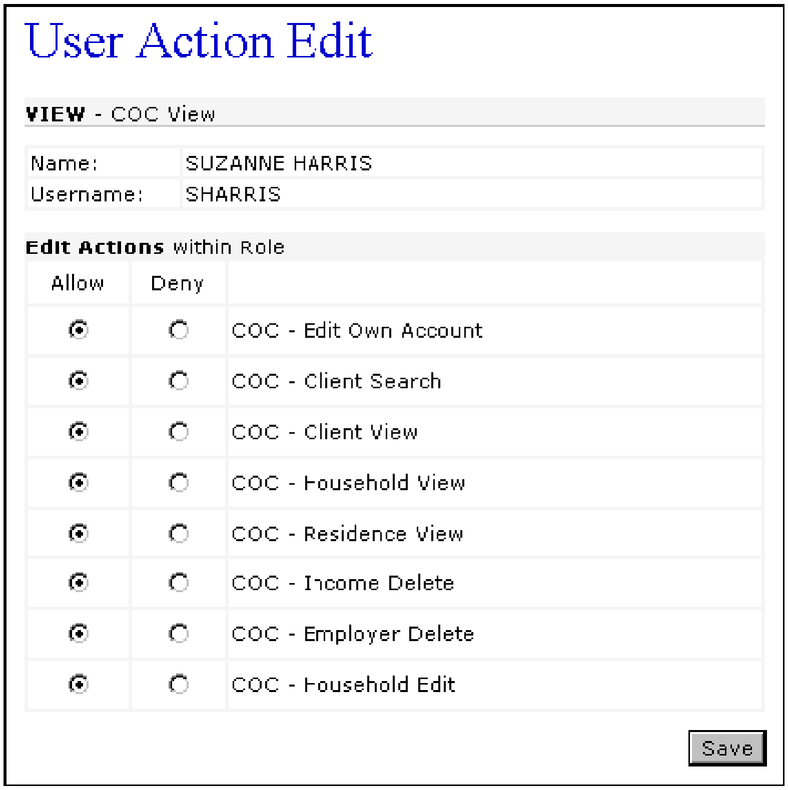


Figure M1-14: User Action Edit for the Manager Role.

User Action Edit - View

Figure M1-15, the ‘User Action Edit’ options are displayed for the view role.


User Action Edit

VIEW - COC View

Name:	SUZANNE HARRIS
Username:	SHARRIS

Edit Actions within Role

Allow	Deny	
◉	○	COC - Edit Own Account
◉	○	COC - Client Search
◉	○	COC - Client View
◉	○	COC - Household View
◉	○	COC - Residence View
◉	○	COC - Income Delete
◉	○	COC - Employer Delete
◉	○	COC - Household Edit

Save

Figure M1-15: User Action Edit for the View Role.

User Action Edit - Intake/Case Management Role

Figure M1-16, the 'User Action edit' options are displayed for the Intake/ Case Management role.

User Action Edit

INTAKE - COC Intake

Name:	SUZANNE HARRIS
Username:	SHARRIS

Edit Actions within Role

Allow	Deny	
		COC - Remove Household from Residence
		COC - Client New
		COC - Client Edit
		COC - County Select
		COC - Employer New
		COC - Employer Edit
		COC - Income New
		COC - Income Edit
		COC - Mailing Address and Phone Update
		COC - Merge Households
		COC - Move Client to Household
		COC - Residence Edit
		COC - Residence New
		COC - Move Household to Another Household
		COC - Remove Client from Household
		COC - Enrollment View
		COC - Assessment New
		COC - Assessment Edit
		COC - Enrollment New
		COC - Enrollment Client View
		COC - Enrollment Summary
		COC - Housing Transaction Step 1
		COC - Enrollment Housing View
		COC - Service Transaction New
		HMIS_COC Housing Transaction Summary
		HMIS_COC Housing Transaction Step 2
		HMIS_COC Housing Transaction Step 3
		HMIS_COC Housing Transaction Step 4
		COC - Apc Housing Detail Delete
		COC - Shelter Transaction New
		COC - Shelter Transaction Edit
		COC - Service Transaction Edit
		COC - Program Exit Edit
		COC - Program Enrollment Edit

Save

Figure M1-16: User Action Edit for the Intake/Case Management Role.

User Action Edit – Admin

In Figure M1-17, the 'User Action Edit' options are displayed for the Admin role.

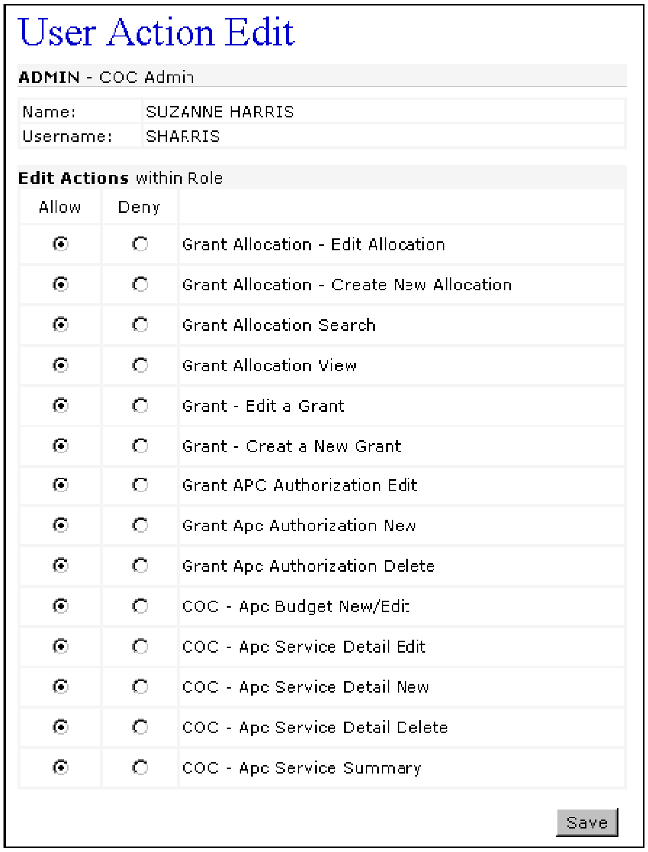


Figure M1-17: User Action Edit for the Admin Role.

User Edit

The ‘User Edit’ Screen allows a manager to update user information, such as the name, e-mail address, user roles, or reset a user's password.

Setup: You are on the ‘User View’ screen.

1. Click the “Edit User” button. The ‘User Edit’ screen will appear *(see Figure M1-18)*.

2. To change the user’s title. Click the “Save Changes” button. The User View screen will appear next with changes completed. There may be times that a manager needs to reset a user’s password. Follow the steps below.

Figure M1-18: User View - Edit User button

Reset User Password

Setup: You are on the 'User View' screen.

1. Click the 'Edit User' button. The 'User Edit' screen will appear *(see Figure M1-18)*.

2. On the 'User Edit' screen, at the bottom, "Reset password" check box (see Figure M1- 19). A manager would use this feature if a password was forgotten, or if it needs to be changed for routine reasons.

NOTE: A password can not be reused right away. A new password needs to be created and can not be similar to the previous password. If the new password is similar to the old one, the system will identify the new password as the old password and will not allow the user access.

3. Click the "Save Changes" button. The 'User View' screen will display next. The user will need to log in with a temporary password (see Section One - Basic Operations).

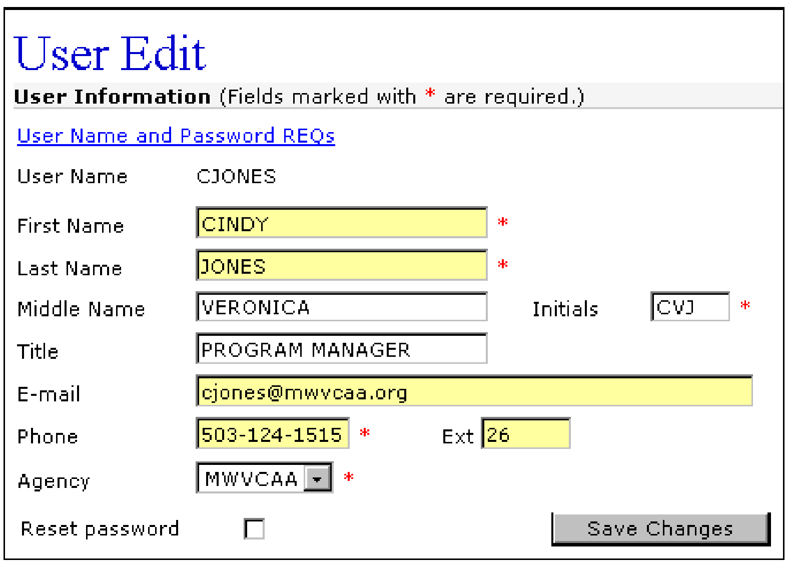


Figure M1-19: User Edit screen - Change Password

M2 Section
Management Functions

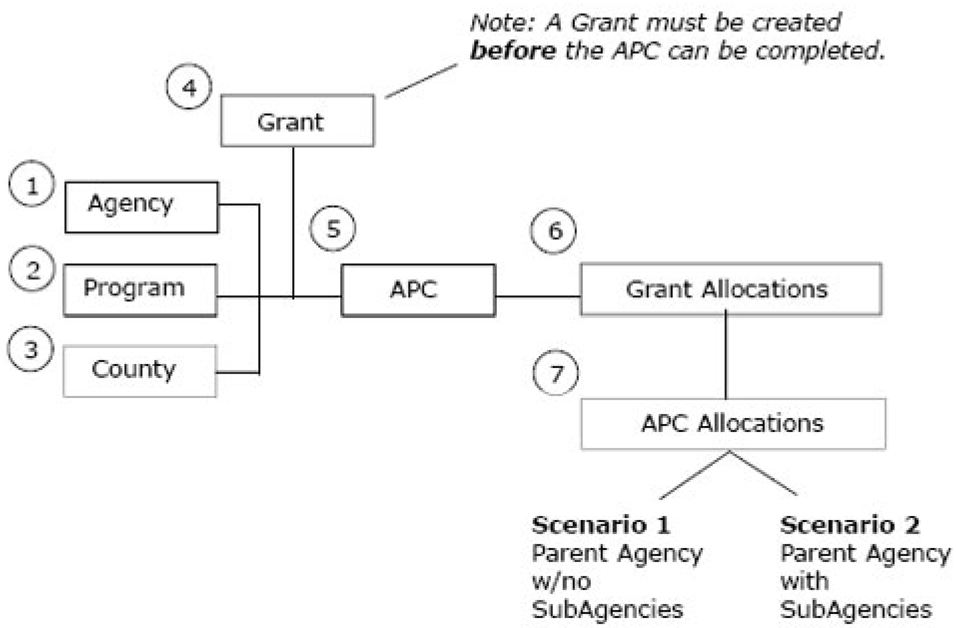
The Tree Structure to Building Programs in OPUS

In order for programs to be utilized in OPUS, an 'APC tree' structure must be established in OPUS which recognizes the programs so that clients can enroll and receive services.

APC stands for: 1-Agency, 2-Program, 3-County, and M2-Grant. The 'APC tree' structure includes the necessary components to be able to allocate grant funds from the grant level to the agency level, and make funds available for client assistance programs. This structure produces 'APC(s)' which act as specific program accounts that receive grant allocations and allow clients to enroll in programs.

This diagram offers a visual representation of an APC Tree Structure.

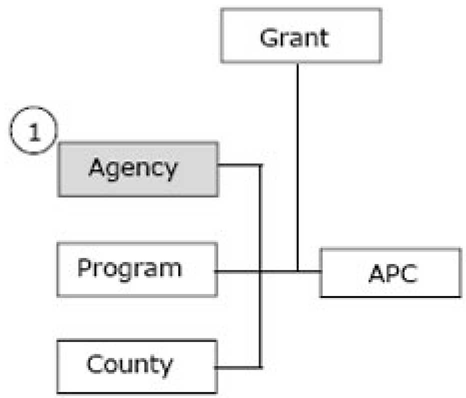
APC Tree Structure



If an APC hasn't been created yet, the first step is to create the '*Agency'* branch of the tree. Proceed to the next section titled, "Agency Search."

Agency Search

An agency using OPUS will most likely have this step created by Oregon Housing and Community Services. The "Manager" role manages the agency screens. Agency Screens allow a manager to create and update records such as address, phone, etc. There are four screen types: Search, New, View and Edit. When a "new" agency is created in OPUS, it is not an agency that may be seen by other agencies.



Setup: Start from the 'Message of the Day' screen.

1. On the Main Menu, scroll the mouse over 'Management', click 'Agency' *(see Figure M2-1)*. The 'Agency Search' screen will appear next *(see Figure M2-2 next page)*.

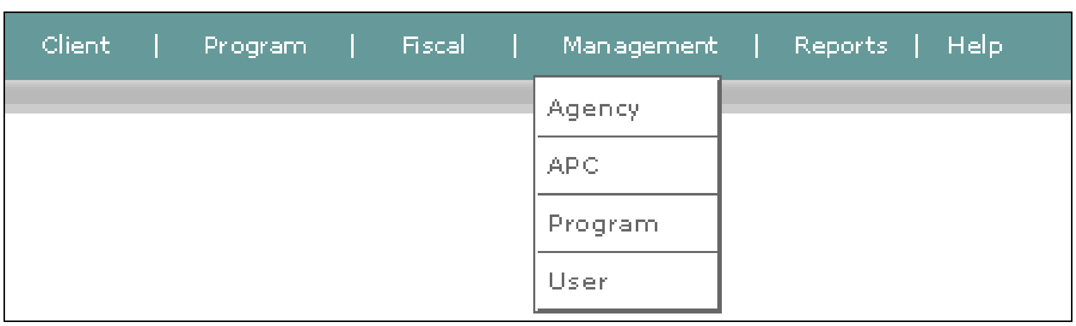


Figure M2-1: Management Menu - Agency Option

2. Enter an agency abbreviation in the 'ABBR' box and click the 'Search' button.

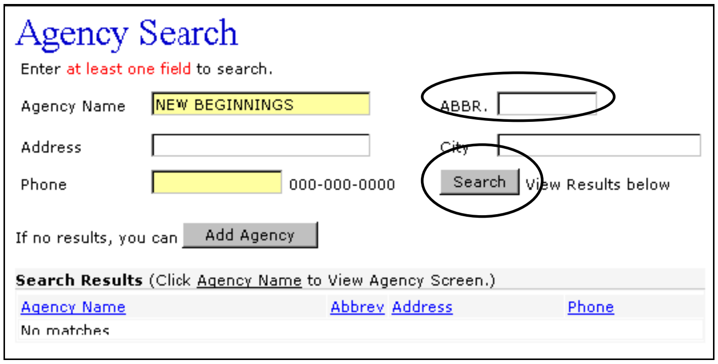
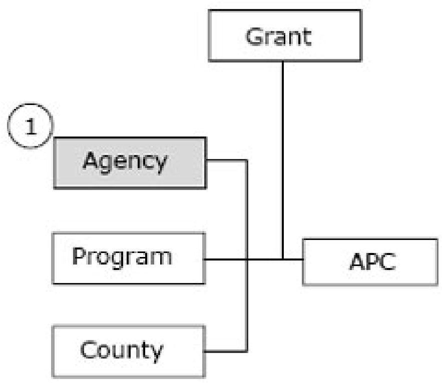


Figure M2-2: Agency Search screen

Agency New

A new agency can be created by following the steps.



Setup: You are on the Agency Search screen.

1. On the 'Left Nav Bar', under 'Agency', click the 'New' link. The 'Agency New' screen will appear next *(see Figure M2-3)*.

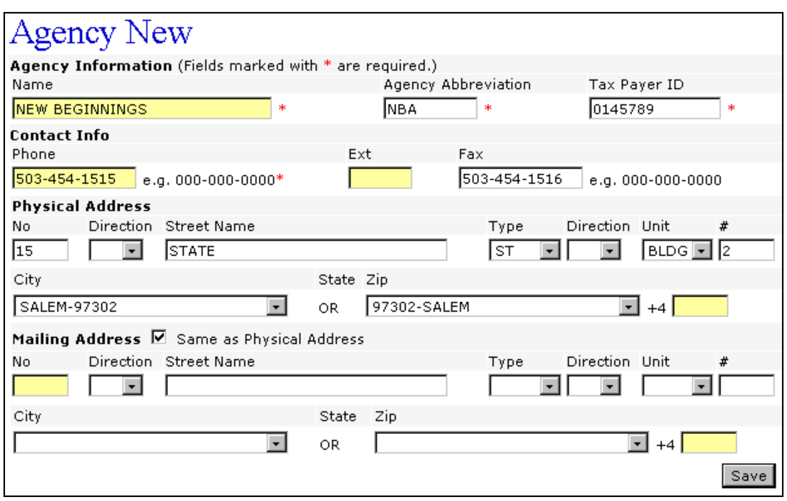


Figure M2-3: Agency New screen

2. Enter or Select, all fields marked * are required.

- **a.** Agency Name
- **b.** Agency Abbreviation
- **c.** Tax Payer ID
- **d.** Contact Phone and Fax numbers
- **e.** Physical address
- **f.** Mailing address
- **g.** Click Save button to save

The Agency View screen will appear next *(see Figure M2-4)*.

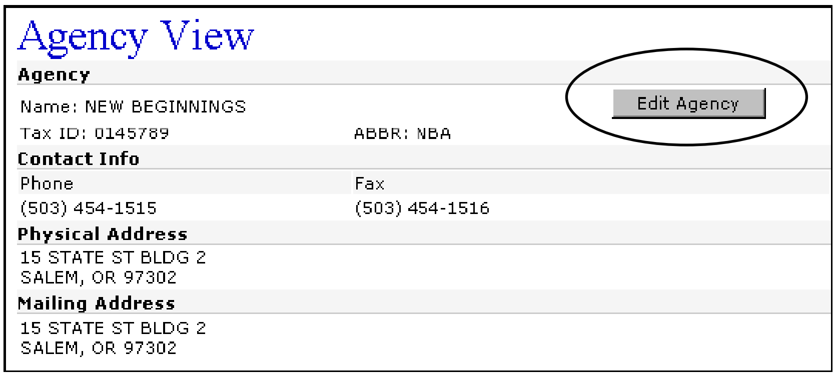


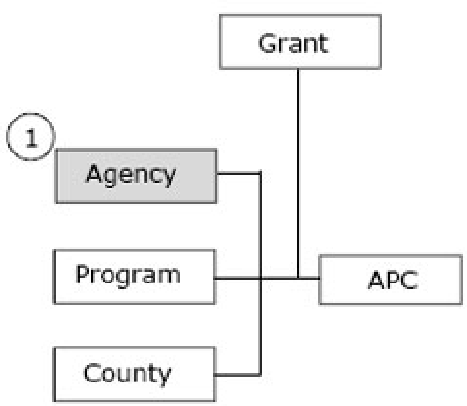
Figure M2-4: Agency View screen

Agency View

The 'Agency View' screen *(see Figure M2-4, above)*, provides a "view-only" "snap-shot" of agency information. To edit agency information, click the 'Edit Agency' button on the right-side of screen, or on the Left Navigation Bar. The 'Agency Edit' screen will appear next.

Agency Edit

The 'Agency Edit' screen provides "editable" 1 fields to update information.



Setup: In working from the last section, you are on the Agency Edit screen.

1. The following fields can be updated on the Agency Edit screen *(see Figure M2-5)*.

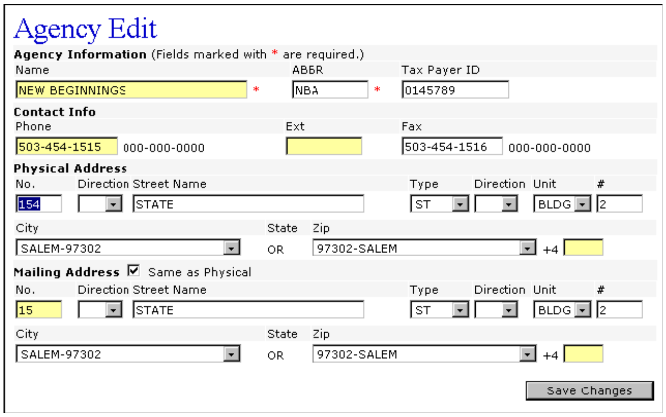
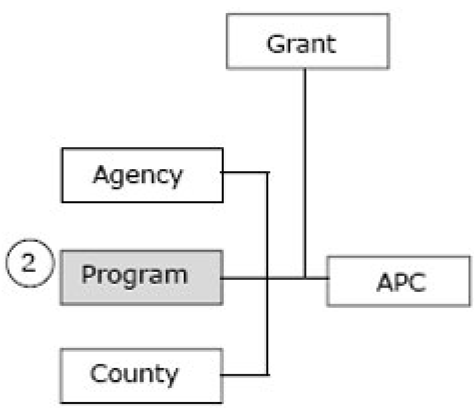


Figure M2-5: Agency Edit screen

Note: All fields marked * are required before saving, see next page.

- **a.** Agency Name
- **b.** Agency Abbreviation
- **c.** Agency tax payer ID
- **d.** Contact Phone and Fax numbers
- **e.** Physical address
- **f.** Mailing address
- **g.** Click the Save Changes button The Agency View screen will appear next with the updated information.

Program Screens



Program screens allow agencies to update or create programs in OPUS. There are four program screen types: Search, New, View and Edit.

In some cases, an 'OHCS-sponsored' program may have been setup initially by the State of Oregon Housing and Community Services. At the agency level, 'new' programs may be created, and if additional third party grant funds are available, the OPUS system can be utilized for local programs by using the OPUS business rules and reports.

Program Search

Setup: You are on the 'Message of the Day' screen.

1. On the main menu, scroll the mouse over 'Management', and click 'Program' in the drop down menu *(see Figure M2-6)*. The 'Program/View Search' screen will appear next *(see Figure M2-7)*.

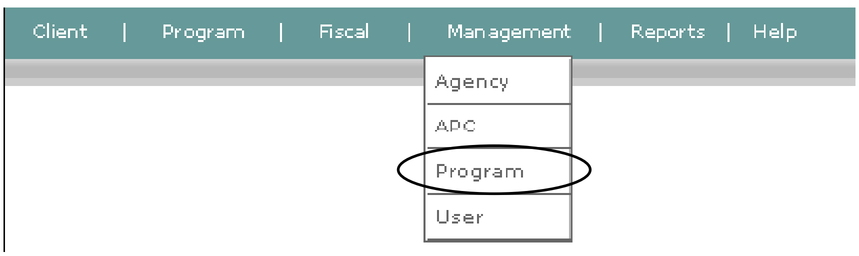


Figure M2-6: Management Menu Drop-down Menu

Figure M2-7: Program Search/View screen.

2. Enter a program name to search. The 'Program Search' screen works as both a <u>search</u> and a <u>view</u> screen. A program is created with basic components: program code, program name, start date and end date. If there are no results, click the 'New Program' button. The 'Program New' screen will appear next - see next section *(page 24)* on how to create a new program.

Program New

You are on the 'Message of the Day' screen. On the main menu, scroll the mouse over 'Management', and click 'Program' in the drop down menu *(see Figure M2-8)*.

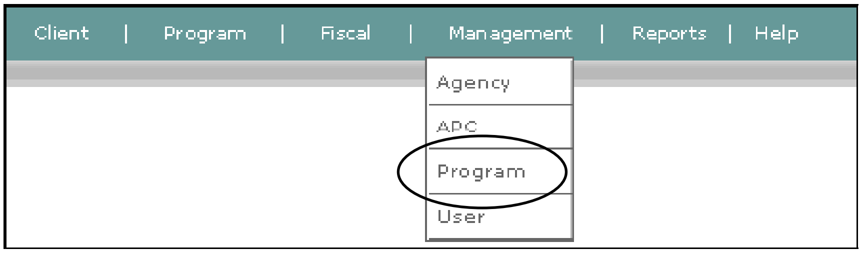
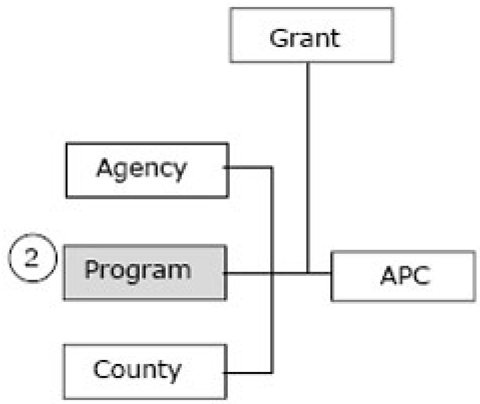


Figure M2-8: Main Menu Drop-down Menu



To create a new program, follow the steps.

Setup: You are on the 'Program Search/View' screen.

1. Search for the Program. If the program is not found, click the 'New Program' button, or the 'New' link under Program on the Left Nav Bar. The Program New screen will appear next *(see Figure M2-9)*.

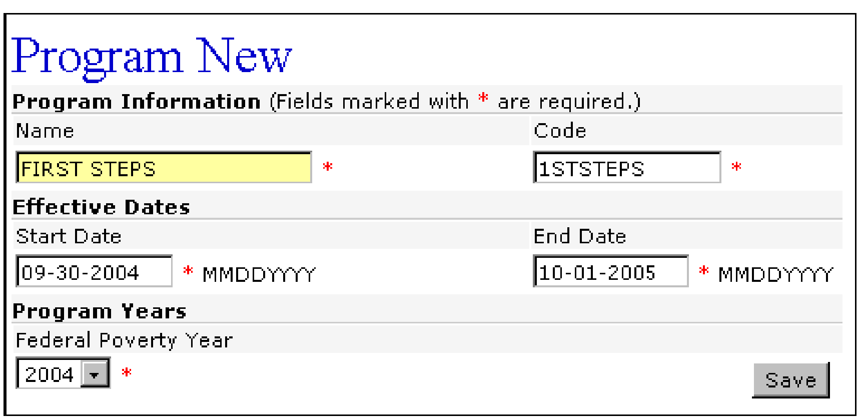


Figure M2-9: Program New

2. Enter or Select; all fields marked * are required.

- **a.** Program Name
- **b.** Program Code
- **c.** Program Type
- **d.** Start Date and End Date
- **e.** Program Years for calculations
- **f.** Click "Save" button

The Program Search/View screen will appear next *(see Figure M2-10)*.

Figure M2-10: Program Search/View

Program View

The 'Program Search/View' screen acts like a 'Search' and a 'View' screen. Search for the program that you created in the previous section, click the 'Search' button and it will show up in the results section *(see Figure M2-11)*.

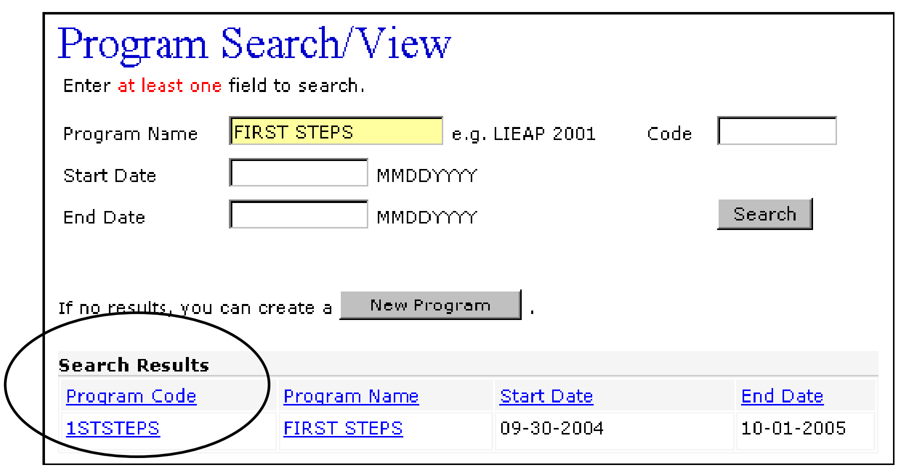


Figure M2-11: Program Search/View

Program Edit

Setup: You are on the 'Program Search/View' screen.

1. Search for the program. Click the program name in the results. The 'Program Edit' screen will appear next *(see Figure M2-12)*.

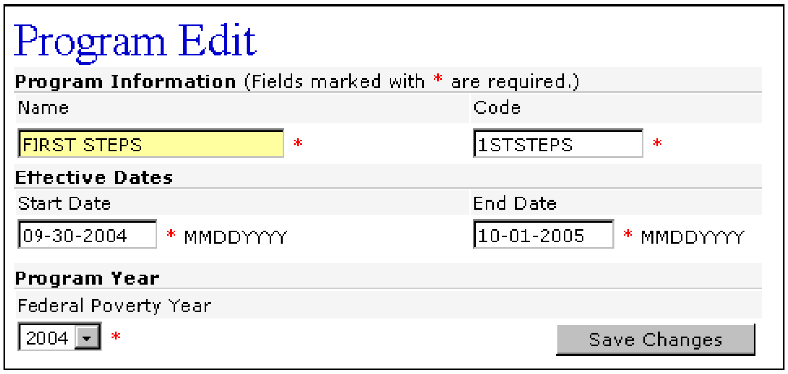


Figure M2-12: Program Search/View

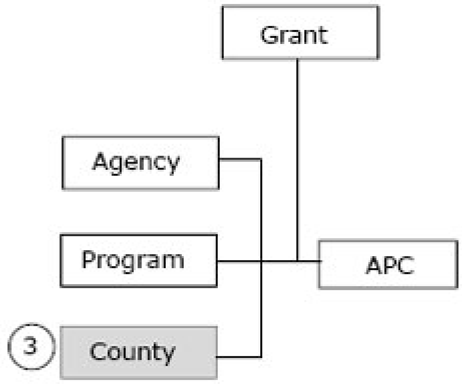
2. Updated fields as needed *(see Figure M2-12)*, all fields marked * are required.

- **a.** Program Name
- **b.** Program Code
- **c.** Effective Program Start Date
- **d.** Effective Program End Date
- **e.** Program Federal Poverty Year
- **f.** Click "Save Changes" button

The 'Program Search/View' screen will appear next. Search for the program and you'll see the changes made in the search results *(see Figure M2-13)*.

Figure M2-13: Program Search/View

Counties in OPUS



Counties will be available to select from dropdown menus on any screen requiring them. All Oregon counties were obtained from the U.S. Postal Service are setup in the OPUS database. Therefore, whenever a county is asked for on a screen, a drop-down list of Oregon counties will be available to choose from *(see Figure M2-14)*.

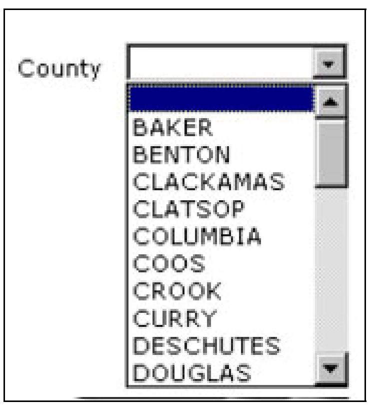


Figure M2-14: County Select drop-down menu.

The Next Step of an APC Tree Structure

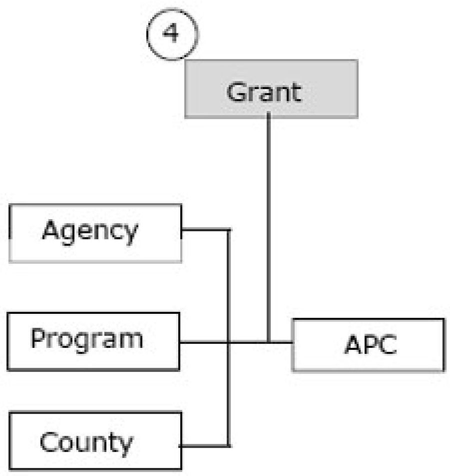
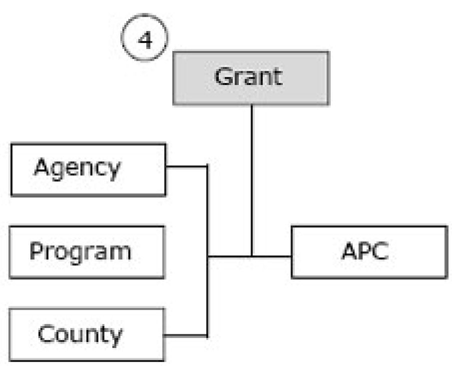


Figure M2-15: Grant component of the APC Tree Structure.

Thus far, the Agency, Program and County components have been explained. The next step is to setup a Grant. The grant will create a fund that is used to allocate funds down the APC tree structure *(see Figure M2-15)*. The next section explains the steps in creating a Grant.

Grant Search



A grant holds the funds which will be allocated to APC(s) for programs which are used for client assistance in OPUS. As always, it's important to search for the grant to see if it already exists in the database before creating a new one.

Setup: Start from the ‘Message of the Day’ screen.

1. From the Main Menu, roll the mouse over the Fiscal menu and down to Grant. Click the Grant option *(see Figure M2-16)*.

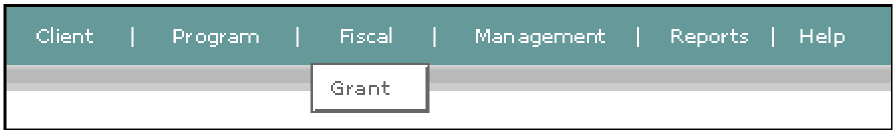


Figure M2-16: Fiscal menu on the Main menu.

The Grant Search screen will appear next *(see Figure M2-17)*.

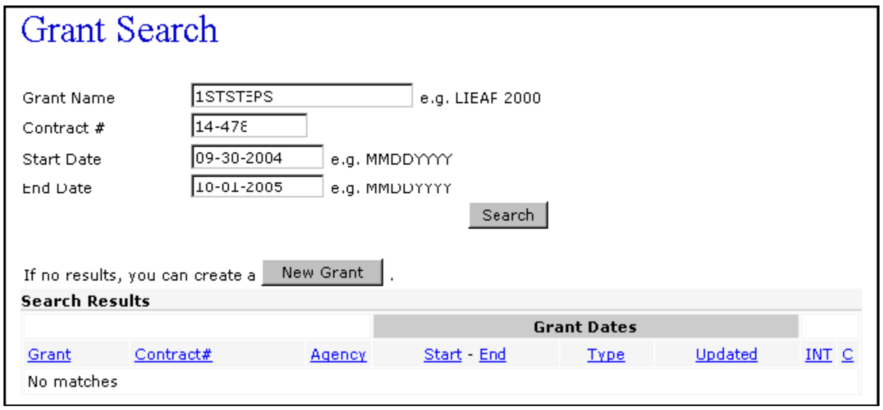
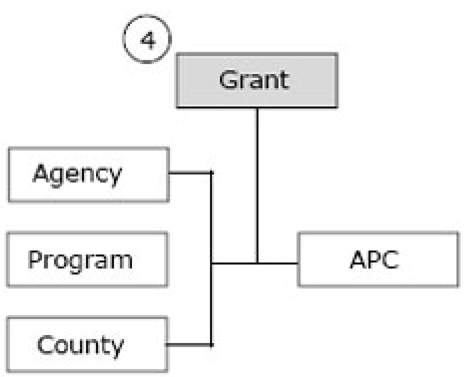


Figure M2-17: Grant Search screen.

2. Enter a grant name, contract number, start and/or end date. Click the ‘Search’ button.
3. The search results will appear below with any matches. If no results are found, then you can proceed to create a New Grant. Follow steps in the next section titled “Grant New”.

Grant New



Setup: Start from the ‘Grant Search’ screen.

1. Click the ‘New’ link on the Left Navigation Bar under Grant *(see Figure M2-18)*. The Grant New screen will appear next.

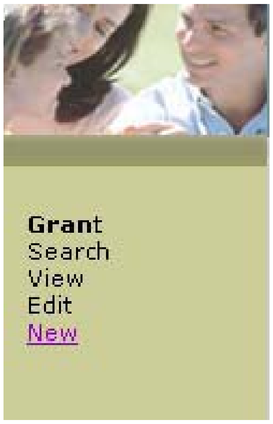


Figure M2-18: Left Nav Bar - Grant New link

2. Enter the following information. All fields marked with a * are required *(see Figure M2-19)*.

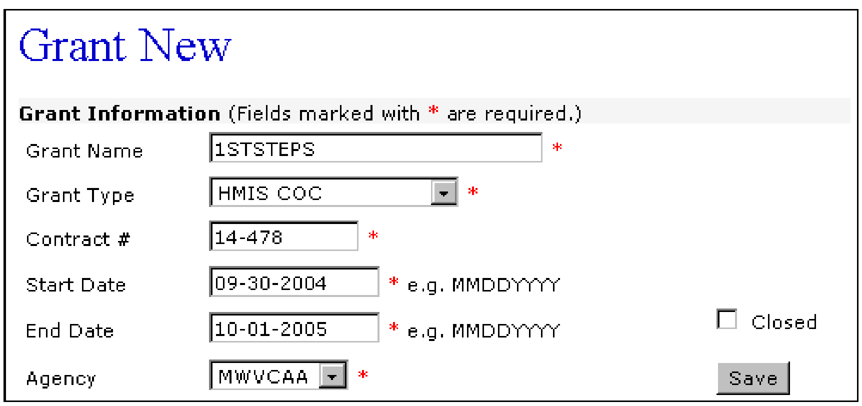
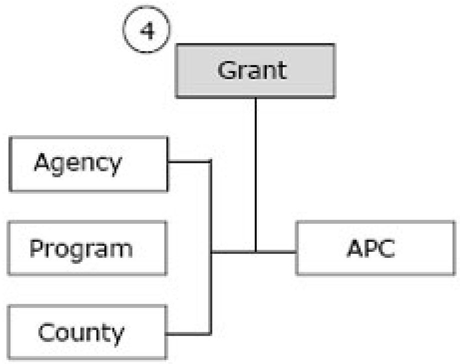


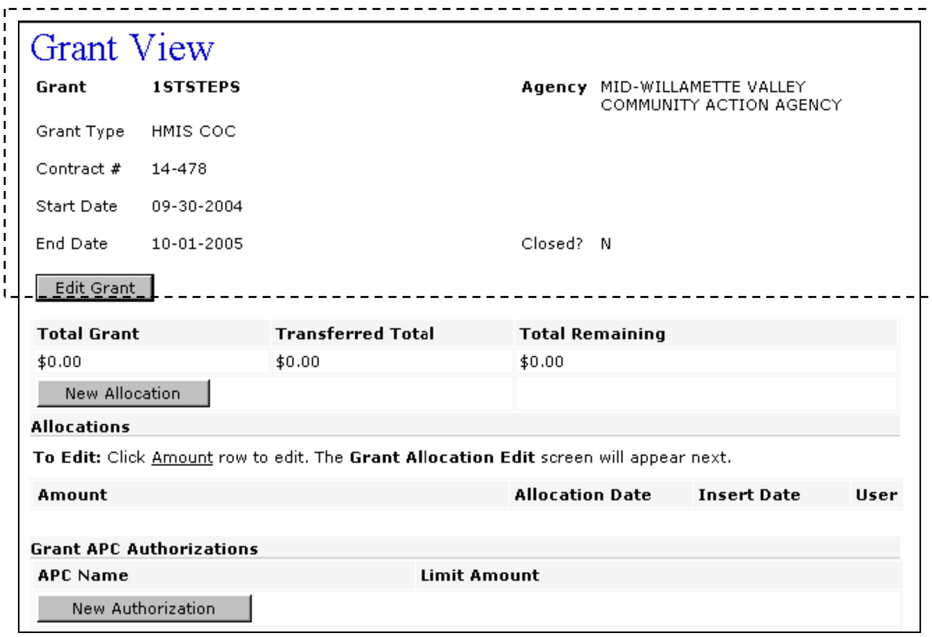
Figure M2-19: Grant New screen

a. Grant name
b. Grant type
c. Contract number
e. Start Date
f. End Date
g. Agency
h. Leave the ‘Closed’ option unchecked in order to use the Grant.
i. Click the “Save” button, the Grant View will appear next.

Grant View



On the Grant View screen, you'll see on the top portion of the screen a view of the grant name, grant type, contract number, start and end dates, and the agency name *(see Figure M2-20)*.



Grant View

Grant **1STSTEPS**

Agency MID-WILLAMETTE VALLEY COMMUNITY ACTION AGENCY

Grant Type HMIS COC

Contract # 14-478

Start Date 09-30-2004

End Date 10-01-2005

Closed? N

Edit Grant

Total Grant	Transferred Total	Total Remaining
$0.00	$0.00	$0.00

New Allocation

Allocations

To Edit: Click Amount row to edit. The **Grant Allocation Edit** screen will appear next.

Amount	Allocation Date	Insert Date	User

Grant APC Authorizations

APC Name	Limit Amount

New Authorization

Figure M2-20: Grant View screen

If you notice something that needs corrected in information that was entered on the Grant New screen, click the Edit Grant button to update the information *(see Figure M2-20)*. Also, see the next section titled 'Grant Edit' for more information. The Grant View screen provides a manager the ability to allocate, manage, and authorize grant funds to agencies to be used for program assistance in OPUS. The middle and lower sections of the Grant View screen are the areas managers use to manage and allocated their grant funds. This is fully explained in the section titled 'Grant Allocations'.

Grant Edit

A grant can be edited from the 'Grant View' screen by following these guidelines:

Setup: You are on the 'Grant View' screen.

1 Click the 'Edit' link on the Left Navigation Bar under Grant *(see Figure M2-21)*. The 'Grant Edit' screen will appear next.

Figure M2-21: Left Nav Bar - Grant

2 You can edit the following information. All fields marked with a * are required *(see Figure M2-22)*.

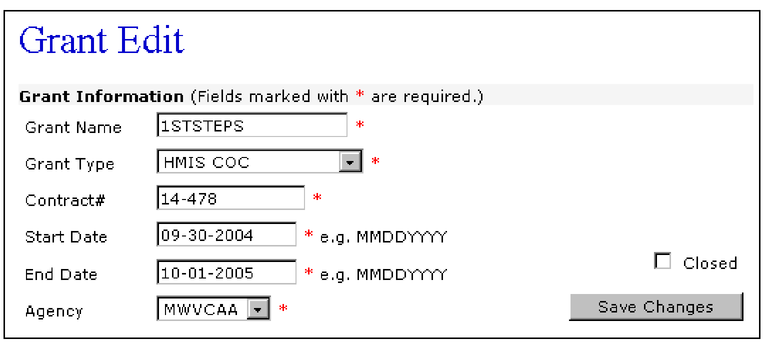


Figure M2-22: Grant Edit

- **a.** Grant name
- **b.** Contract number
- **c.** Start Date
- **d.** End Date
- **e.** Agency
- **f.** Leave the 'Closed' option unchecked in order to use the Grant.
- **g.** Click the Save button, the Grant View will appear next *(See Figure M2-23, page 33)*.

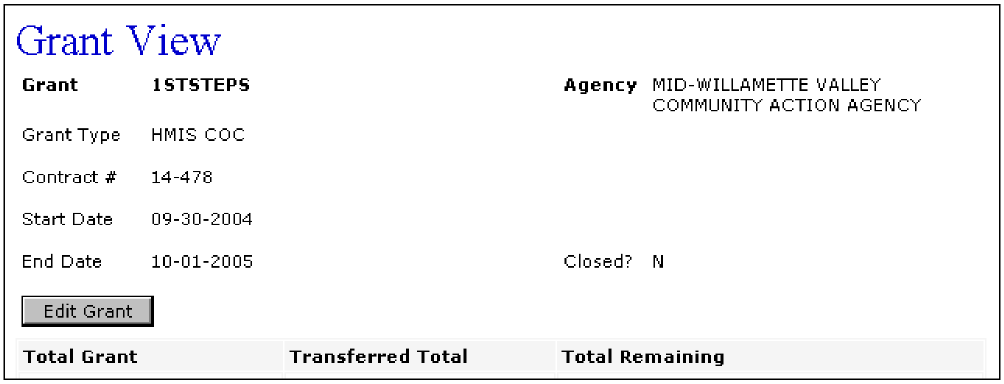


Figure M2-23: Grant View

APC Screens

The acronym APC stands for Agency, Program, and County. The four types of APC Screens: Search, New, View and Edit, allow a manager to complete the final step of the APC tree structure by pulling the previously created components: Agency, Grant, and Program, with or without a County. Additional details will be entered and structured at the APC level such as: which agencies will utilize a specific program, and the start and end dates for an APC(s) operating budget.

The APC tree structure can be either a Parent Level APC agency, or a Child Level APC agency, as this will be explained in the following sections. Each type of APC manages their APC program and budget accounts. Grant funds are allocated to either the Parent Level or to a Child or sub-agency level depending on where the services and programs are administered to at the client-level.

Essentially, there are two scenarios involved:
(1) - an agency sets up a tree structure with only one agency that is responsible for its own budget and provides its own services utilizing grant funds, or (2) - an agency creates one or several sub-agencies, or county-level agencies, that administer their own separate budgets and provide direct services to their clients, but not from a parent level. For a visual diagram of this, *see Figure M2-25b*. There are four APC screen types: Search, New, View and Edit.

APC Search

As always, it's important to search an APC to see if it exists in the database before creating a new one.

Setup: Start from the 'Message of the Day' screen.

1 On the Main Menu, Scroll the mouse over the 'Management' menu, and scroll down and click the 'APC' item *(see Figure M2-24)*. The 'APC Search' screen will appear next *(see Figure M2-25a, page 35)*.

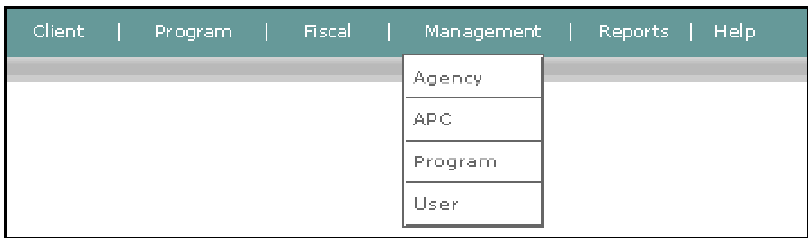
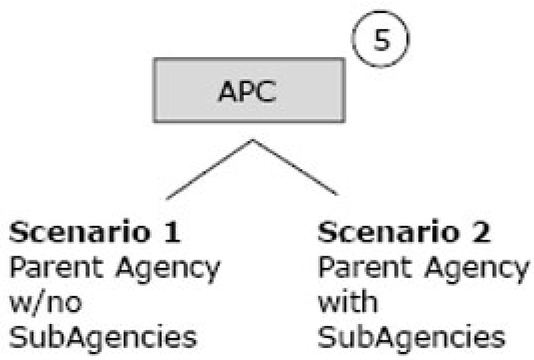


Figure M2-24: Main Menu - APC



2. Select or enter one or more search criteria such as: Agency, County, Program, Grant, Start and End Dates, COC Affiliation Code, or HUD Program Type. Click the "Search" button.

3. The search results will appear below with any matches *(see Figure M2-25a)* to the APC you are looking for. If no results are found, then you can proceed to create a New APC. Follow steps in the next section titled 'APC New'.

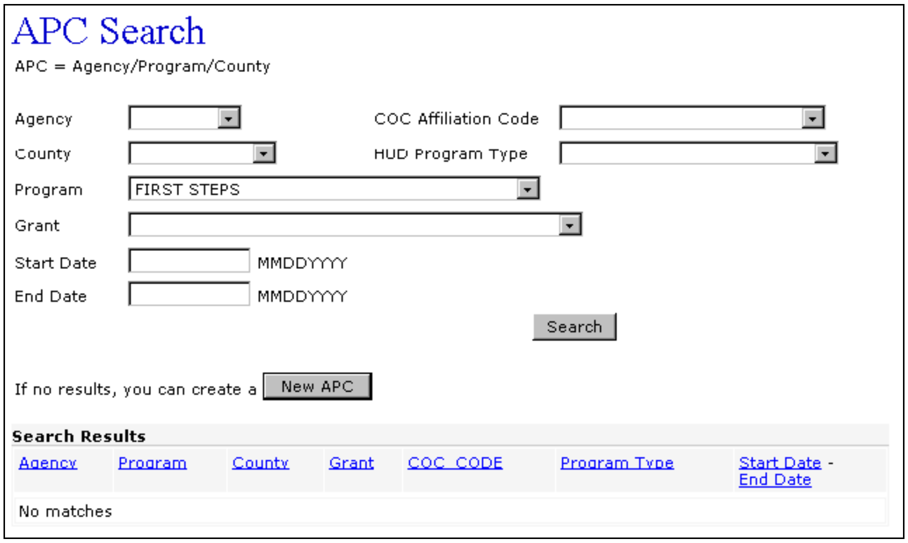


Figure M2-25a: APC Search screen

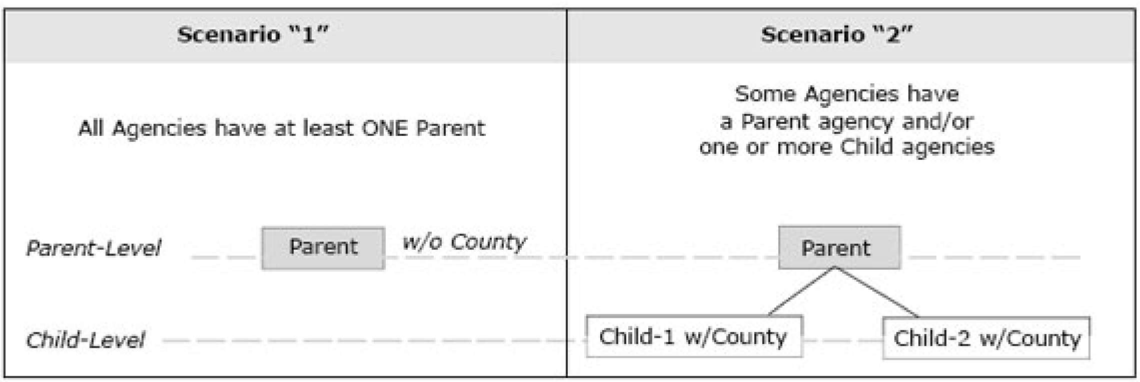
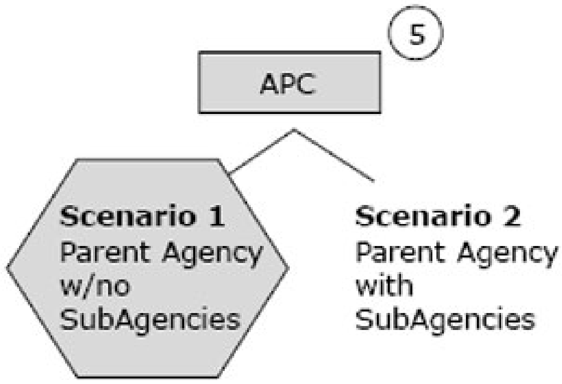


Figure M2-25b: Scenarios of possible Agency 'APC Tree Structures'.

APC New



Scenario #1 - The Parent APC

The Parent APC includes the top-level agency receiving OHCS sponsored grant funds. A Parent APC may or may not have sub-agencies. Therefore, a Parent APC may provide direct services or program assistance to clients. All agencies start with a Parent APC. Then, f there are sub-agencies under them, each agency would create a Child Level APC by following the steps in *Scenario #2* - The Child APC.
The Parent-level APC will be explained first.

Setup: You are on the APC Search screen.
1. On the Left Nav Bar, click the 'New' link under APC *(see Figure M2-26)*.

Figure M2-26: Left Nav Bar - New link

The ‘APC New’ screen will appear next *(see Figure M2-27)*.

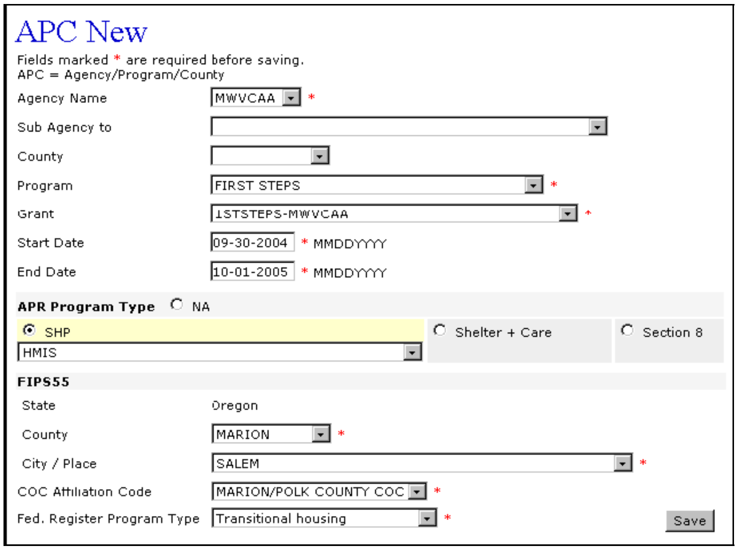


Figure M2-27: APC New screen

2. Select the Agency Name.
3. When creating a Parent Level APC, leave the ‘Sub Agency’ to and the ‘County’ options blank.
4. Select the Program name
5. Select the Grant name
6. Enter the APC start date
7. Enter the APC end date
8. Select the APR Program Type
9. Select the FIPS55 State, County, City, CoC Affiliation Code, and Federal Register Program Type.
10. Click the Save button.

The APC View screen will appear next *(see Figure M2-28)*.

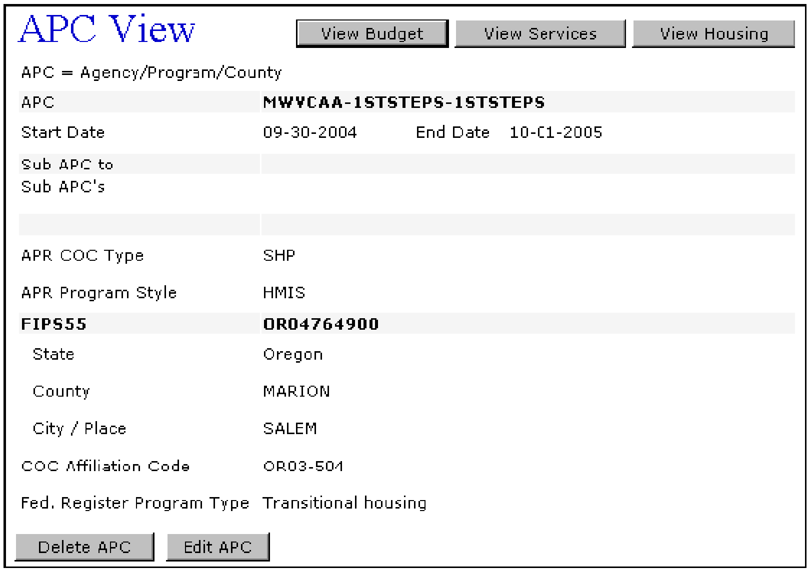


Figure M2-28: APC View screen

APC View

The APC View screen provides a view of the Parent APC *(see Figure M2-28)*. There are several areas on this screen that will be described later within their own sections. Refer to those sections for more details.

Button - Edit APC

If you need to edit something, click the 'Edit APC' button at the bottom of the screen.

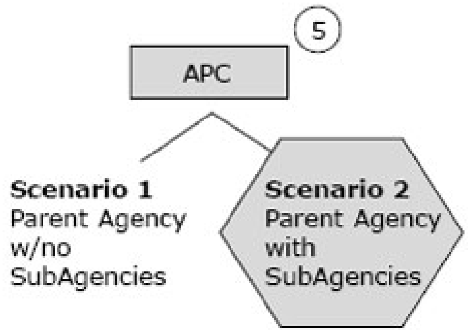
Button - Delete APC

If the APC is no longer needed, then click the 'Delete APC' button.

View Buttons - Budget, Services & Housing Buttons

The 'View Budget' button leads you to enter a budget for a specific APC. For example, if a budget needs to be entered for a Parent APC, you click this button at the parent-level. If you need to enter a budget for a Child APC, use the button on 'APC View' screen for the child level. The same is true for the 'View Services' and 'View Housing' buttons. Each of these areas are described in their respective topic sections of this manual.

Scenario #2 – Child APC



If an agency has sub-agencies under them, each agency should create a 'Child-level' APC. Create a Child-level APC as follows:

Setup: You are on the APC Search screen.

1. On the Left Nav Bar, click the 'New' link under APC *(see Figure M2-29)*.

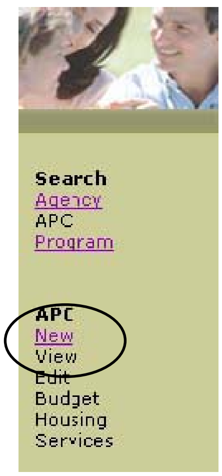


Figure M2-29: Left Nav Bar - New link

The APC New screen will appear next *(see Figure M2-30)*.

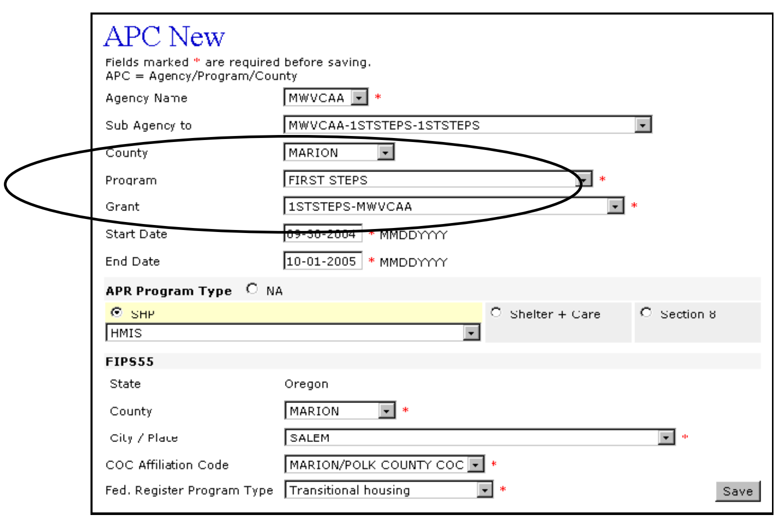


Figure M2-30: APC New screen - Child level

2. Select the Agency Name.
3. When creating a Child Level APC, choose the Parent APC as the option for Sub Agency to, and choose the County for the sub-agency.
4. Select the Program name
5. Select the Grant name
6. Enter the Child APC start date
7. Enter the Child APC end date
8. Select the APR Program Type
9. Select the FIPS55 State, County, City, CoC affiliation Code, and Federal Register Program Type.
10. Click the Save button.

The APC View screen will appear next *(see Figure M2-31)*.

APC View

The APC View screen provides a view of either the parent or child APC, depending on which one you are working on. A parent APC view screen is almost identical to a child APC view screen. The content would be different between parent and child. Notice that the Child APC has the Parent APC listed by the 'Sub-Agency To' area of the screen.

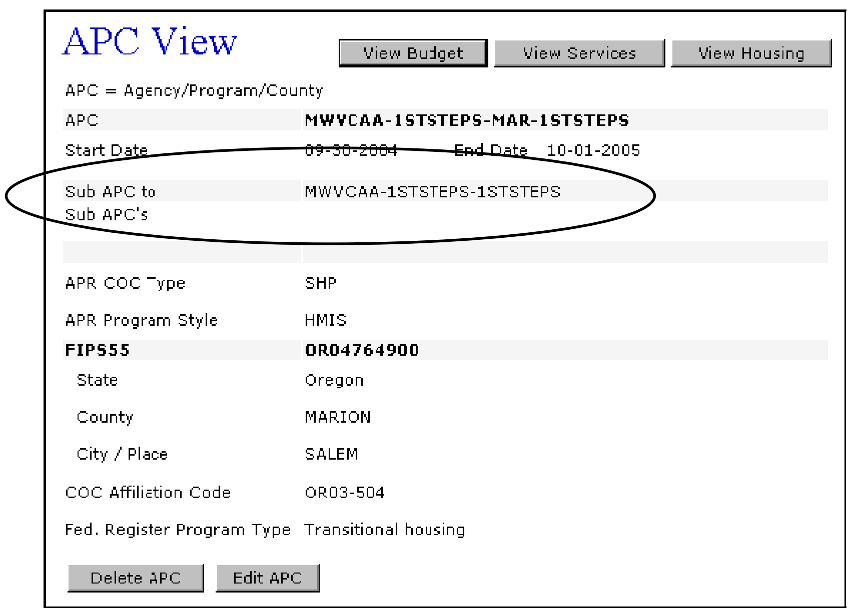


Figure M2-31: APC View screen - Child level

Edit APC

If you need to edit something, click the "Edit APC" button at the bottom of the screen *(see Figure M2-31)*.

Delete APC

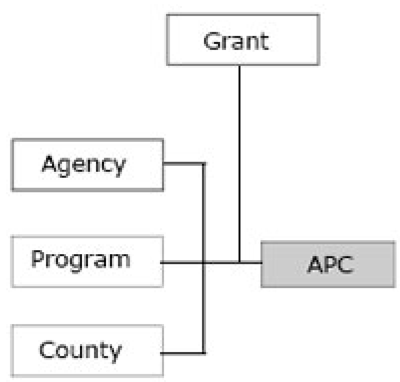
If the APC is no longer needed, then click the "Delete" button *(see Figure M2-31, page M2-40)*.

View Buttons - Budget, Services & Housing

These "View" buttons, at the top of the screen, lead to a budget screen, services screen, or a housing screen for a specific APC. If the Child APC is responsible for administering a budget and providing services, then enter those details by using these buttons at the 'Child Level APC view' screen.

If the Parent APC is responsible for administering the budget and providing services directly to clients, then search for the Parent Level APC, access the 'APC View', and enter the budget, services and housing details there.

Verifying the APC Structure



After setting up the Parent and any Child Level APC(s), it's always a good idea to verify that the tree structure is setup correctly. On the 'APC Search' screen, select the agency name and the program name and click the search button *(see Figure M2-32, page 42)*.

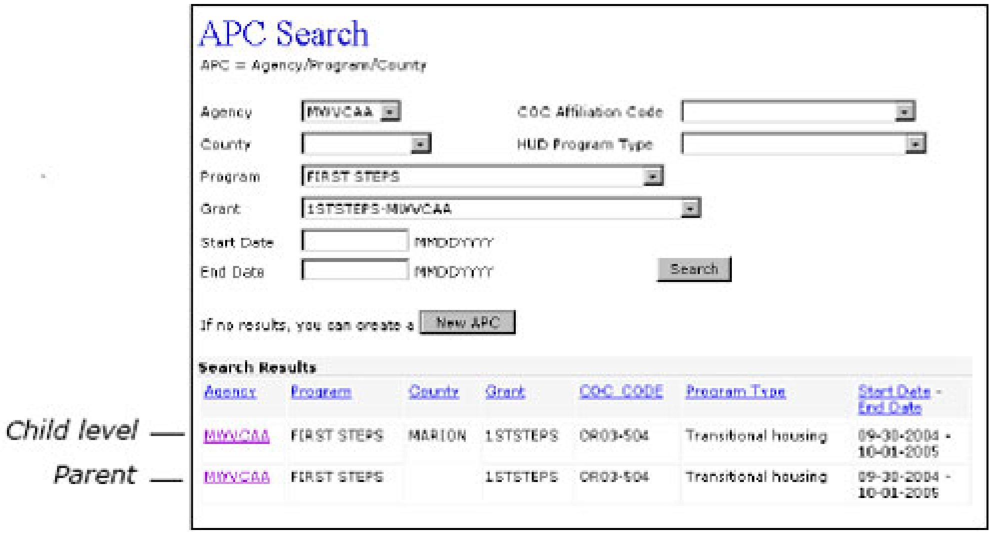


Figure M2-32: APC Search screen

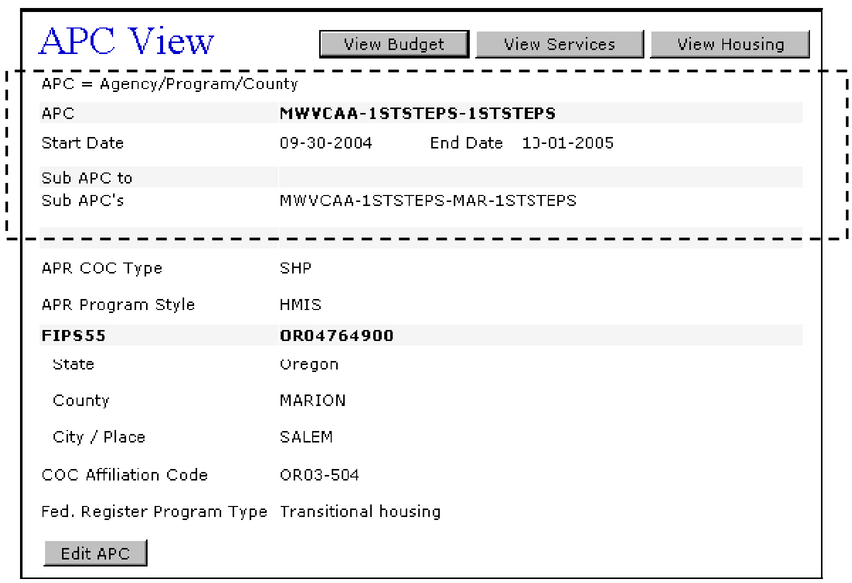


Figure M2-33: APC View screen

In the results, you should find the Parent Level listed with <u>no</u> county, and then any Child Level APC(s) listed with their respective counties in the results.

Each APC link goes to their respective APC View for more details. If anything needs to be edited or updated, such as an extended contract date, click the Edit APC button to see the APC Edit screen *(see Figure M2-33)*.

Grant Allocation

For grant allocations, depending on how an agency administers their services to the client, each APC can hold pockets of allocated grant Funds are to be used for client assistance.

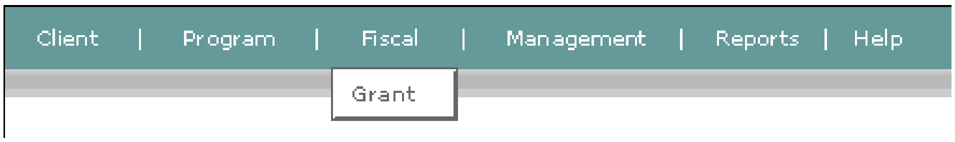


Figure M2-34: Main Menu - Fiscal Drop-down menu

Setup: You are on the APC Search screen.

1. On the Main Menu bar, scroll the mouse over 'Fiscal', and click on the 'Grant' option. The 'Grant Search' screen will appear next.
2. Enter the Grant name to search which was created earlier. It will display in the search results *(see Figure M2-35)*.

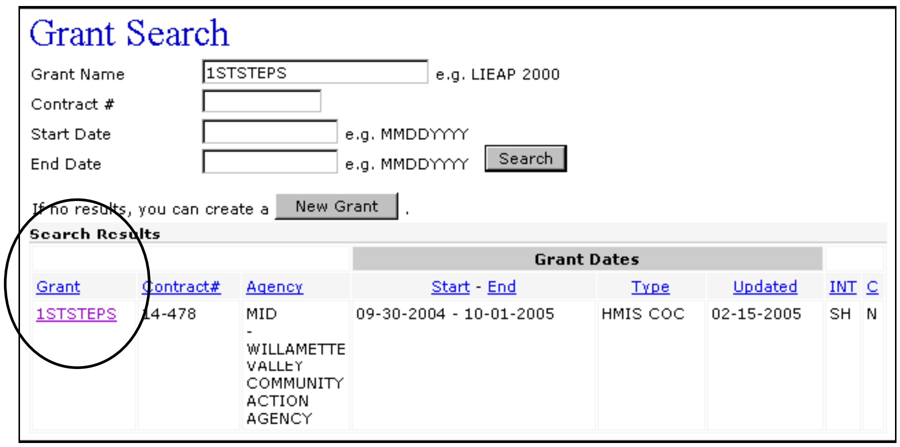


Figure M2-35: Grant Search screen

3. In the Results section, click the Grant link, the 'Grant View' screen will appear next *(see Figure M2-36)*.

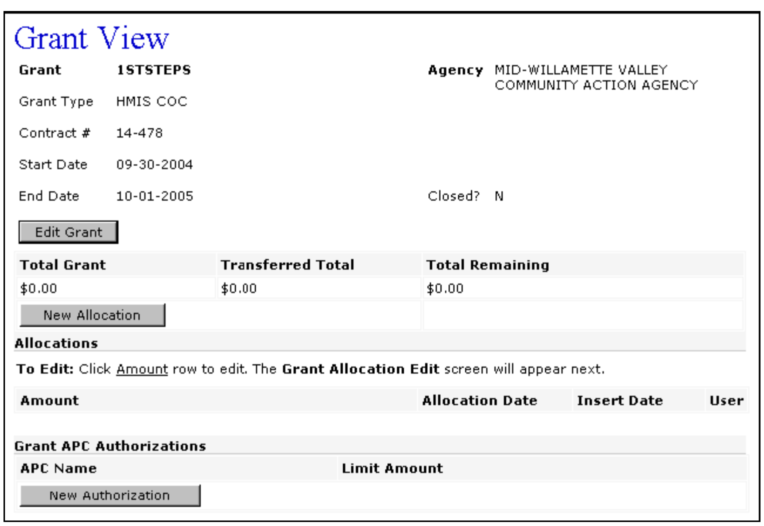


Figure M2-36: Grant View screen - Before Allocations

The Grant View screen displays several areas:

A. Allocations - This area displays the grant fund which establishes the 'base' grant. The labels in this area include: Total Grant, Transferred Total, and Total Remaining. The button labeled 'New Allocation' allows you to 'deposit' or 'subtract' funds to/from the Grant.

B. Grant / APC Authorizations - An agency needs to authorize grant allocations to specific APCs - either the Parent or Child Level APCs. As grant funds are transferred to the Parent and/or Child APC levels, the section labeled 'Grant Authorizations' will display a history of transfers as they occur. This is demonstrated in the following exercises.

Grant Allocation New

The 'Grant Allocation New' screen allows a manager to set-up grant funds which are used at the APC level to provide services.

Setup: Start from the Grant View screen.

1. On the 'Grant View' screen, click the button labeled 'New Allocation'. The 'Grant Allocation New' screen will appear next *(see Figure M2-37)*.

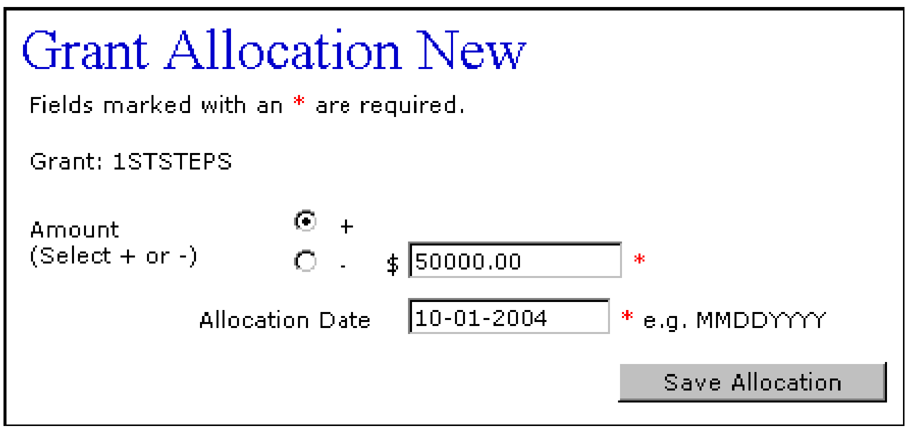


Figure M2-37: Grant Allocation New screen.

2. Enter the dollar amount to add to the grant and select the (+) option to deposit. Selecting the (-) will subtract funds from the balance.

3. Enter the Allocation Date.

4. Click the "Save" button.

On the 'Grant View' *(see Figure M2-38)*, the amount that was allocated will be displayed under the section labeled 'Allocations'. In order to use the funds, the next section titled "APC Authorization New" describes how to transfer funds to the APC level to be used for agency programs.

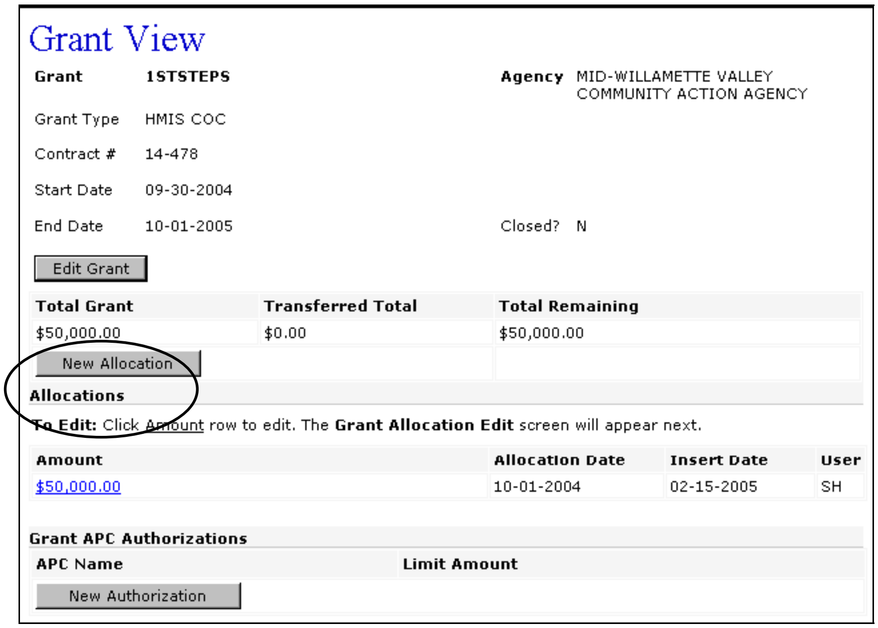


Figure M2-38: Grant View screen - After Grant Allocation

Grant APC Authorization New

The 'Manager' role authorizes funds to the APC level for program assistance.

Setup: You are on the Grant View screen.

1. Click the button 'New Authorization'. The 'Grant APC Authorization New' screen will appear next *(see Figure M2-39)*.

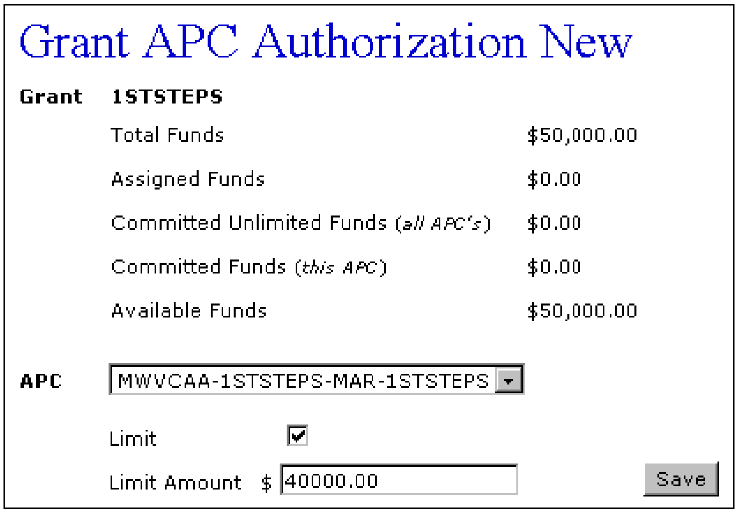


Figure M2-39: Grant APC Allocation New screen

2. Select the APC (either the Parent or Child) to transfer funds to.

Note: the Child APC will have a 'County' appended to it.

3. For the 'limit' checkbox, this is to limit so that the APC doesn't over spend a fixed or limit amount. If a limit amount is needed, select the 'Limit' checkbox and enter the limit amount.

4. Click the 'Save' button. The 'Grant View' will display next. The new authorization will be displayed under the 'Grant Authorizations' section.
In *Figure M2-40, page 47*, the grant authorization was designated to the child APC. Note the 'MAR' County in the APC name *(see Figure M2-40)*. In this case, the Child APC provides the services and administers housing services for clients.

Figure M2-40: Grant View of Authorization to 'Child' APC

In *Figure M2-41*, another authorization was designated to the Parent Level APC. The funds for this APC are designated for managing programs at the Parent-Level purposes such as for outreach, case management, etc.

Figure M2-41: Grant View of Authorization to 'Parent' APC

APC Budgets

The APC budget can be enter for either the Parent or Child APC. Managers or Program Coordinators will enter budgets based on their approved grant work plans and/or technical submissions. Follow the steps below to enter a budget.

Setup: Start from the Message of the Day.

1. On the main menu, scroll mouse over ‘Management’, click the APC option *(see Figure M2-42)*.

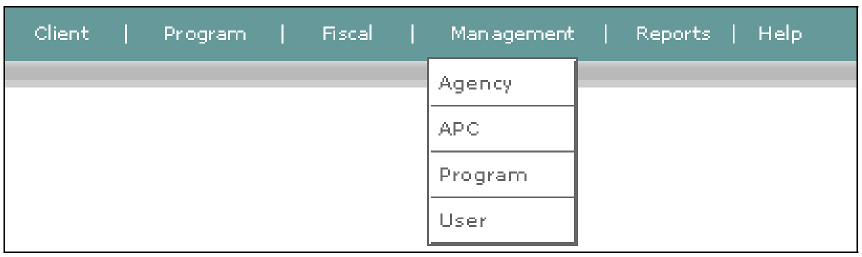


Figure M2-42: Main menu - Management drop-down options

2. Select an agency.
3. Select a program name.
4. Select a grant name.
5. Click the “Search” button. In the results section, the APC matches will appear. A parent APC doesn’t have a county listed, but a child APC does *(see Figure M2-43)*.

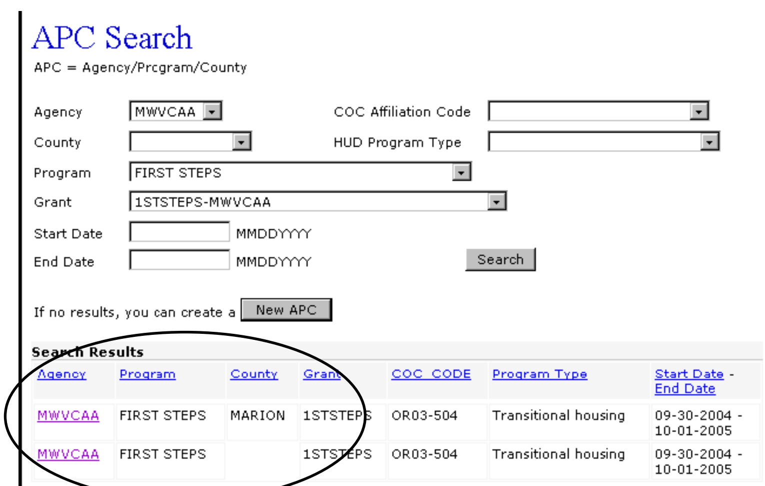
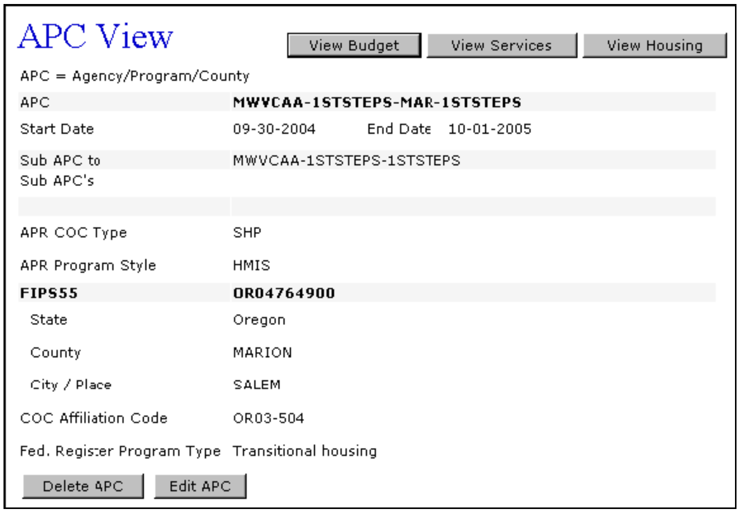


Figure M2-43: APC Search screen.

6. Select the APC link that you want to enter a budget for. The APC View will appear next *(see Figure M2-44)*.



APC View

View Budget | View Services | View Housing

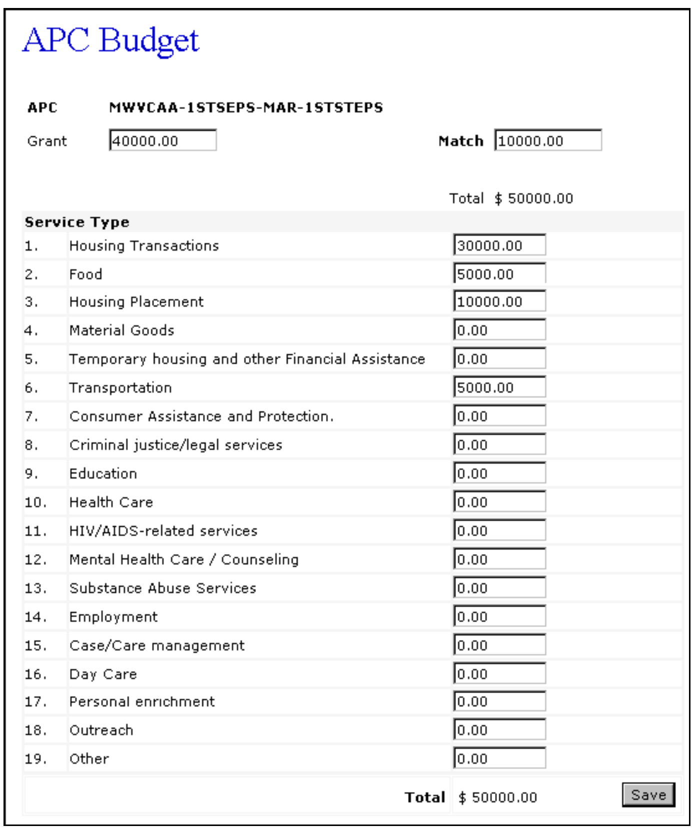
APC = Agency/Program/County

APC	**MWVCAA-1STSTEPS-MAR-1STSTEPS**
Start Date	09-30-2004 End Date 10-01-2005
Sub APC to	MWVCAA-1STSTEPS-1STSTEPS
Sub APC's	
APR COC Type	SHP
APR Program Style	HMIS
FIPS55	**OR04764900**
State	Oregon
County	MARION
City / Place	SALEM
COC Affiliation Code	OR03-504
Fed. Register Program Type	Transitional housing

Delete APC | Edit APC

Figure M2-44: APC View screen.

The APC Budget screen is organized into a list of budget categories *(see Figure M2-45, page 49)*. These budget categories and amounts should match the agencies approved grant plans and technical assistance. For further technical help in completing this screen, contact your program representative with Oregon Housing and Community Services.



APC Budget

APC **MWVCAA-1STSEPS-MAR-1STSTEPS**

Grant 40000.00 **Match** 10000.00

Total $ 50000.00

Service Type		
1.	Housing Transactions	30000.00
2.	Food	5000.00
3.	Housing Placement	10000.00
4.	Material Goods	0.00
5.	Temporary housing and other Financial Assistance	0.00
6.	Transportation	5000.00
7.	Consumer Assistance and Protection.	0.00
8.	Criminal justice/legal services	0.00
9.	Education	0.00
10.	Health Care	0.00
11.	HIV/AIDS-related services	0.00
12.	Mental Health Care / Counseling	0.00
13.	Substance Abuse Services	0.00
14.	Employment	0.00
15.	Case/Care management	0.00
16.	Day Care	0.00
17.	Personal enrichment	0.00
18.	Outreach	0.00
19.	Other	0.00
	Total	$ 50000.00

Save

Figure M2-45: APC Child - Budget View

APC Service Transactions

The APC service transaction is another component of the APC View screen *(see Figure M2-46)*. The APC services will setup the services categories that a client can enroll in.

Setup: Start from the APC View screen.

1. Click the button View Services *(see Figure M2-46)*. The 'APC Service Summary' screen will appear next.

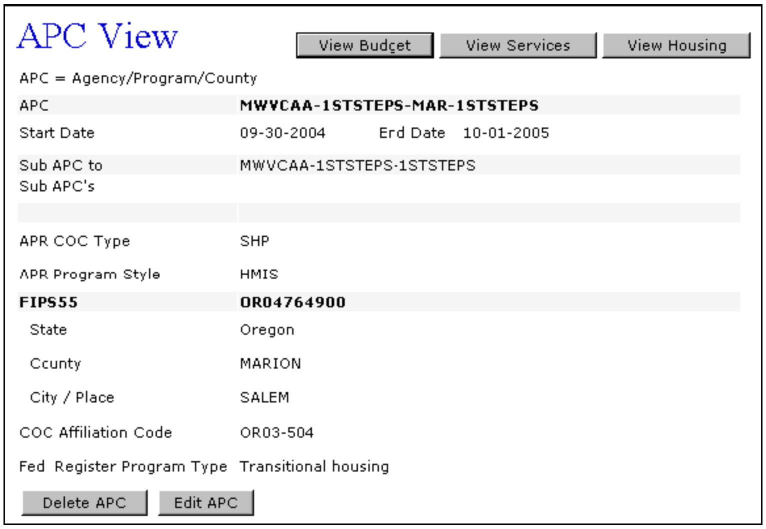


Figure M2-46: APC View screen.

2. No services have been entered yet for this APC, so none will be listed. Click the 'New' button *(see Figure M2-47)*.

Figure M2-47: APC Service Summary screen.

The 'APC Service Detail – New' screen will appear next *(see Figure M2-48a)*.

3. Enter or select the following: All fields marked * are required.

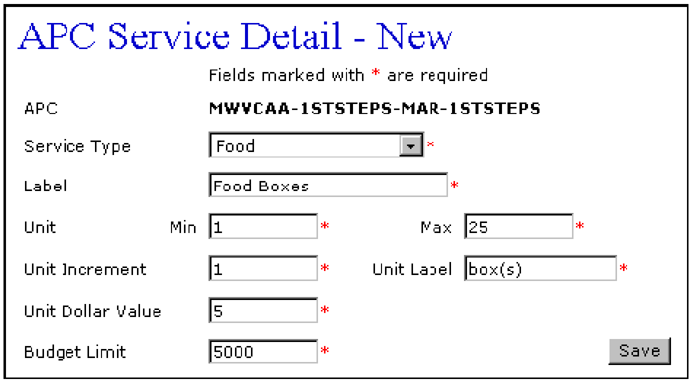


Figure M2-48a: APC Service Detail - New screen.

- **a.** Label name
- **b.** MIN limit and a Max limit
- **c.** A unit increment
- **d.** Unit Label
- **e.** Unit Dollar Value
- **f.** Budget Limit for the service*

  * For the ‘Budget Limit’ field: This should match the category you entered on the Budget screen for this category type.

4. Click the 'Save' button. The 'APC Service Summary' will appear with the service listed *(see Figure M2-48b)*. To create another one, click the 'New' button and following the steps above. There may be times when the APC needs to be edited. Follow the steps on the next page.

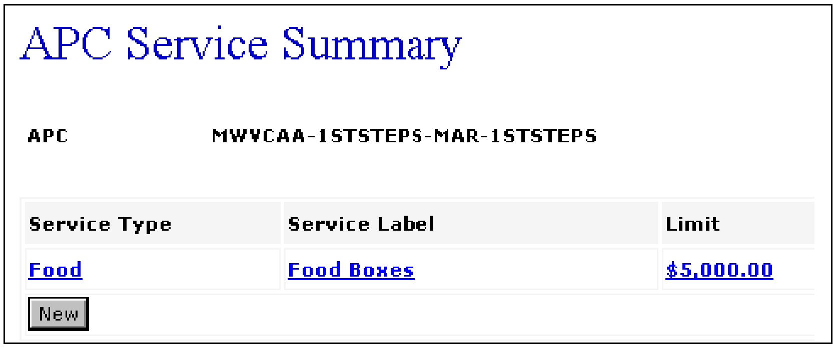


Figure M2-48b: APC Service Summary screen.

An 'APC Service' can be edited or deleted. Follow the steps below to edit or delete a service.

Setup: Start from the APC View screen.

1. From services listed, click the one to be edited or deleted *(see Figure M2-49)*.

Figure M2-49: APC View screen.

The 'APC Service Detail – Edit' screen will appear next *(see Figure M2-50)*.

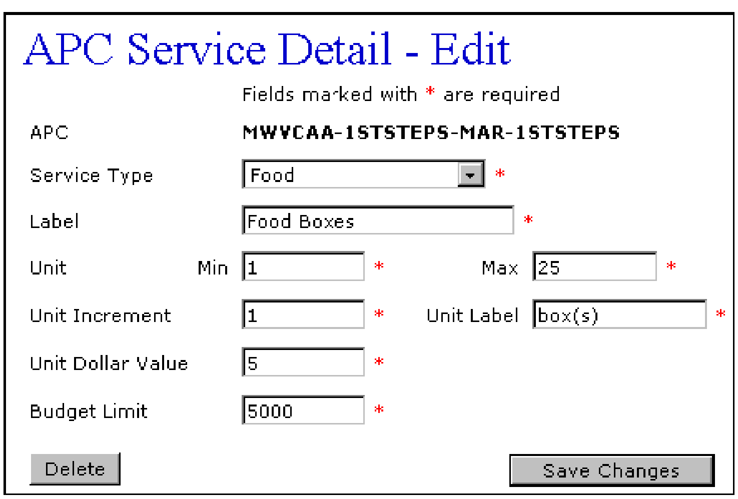


Figure M2-50: APC View screen.

2. To edit the service, follow these steps: All fields marked * are required.

- **a.** Label name
- **b.** MIN limit and a Max limit
- **c.** A unit increment
- **d.** Unit Label
- **e.** Unit Dollar Value
- **f.** Budget Limit for the service*
  The Budget Limit field should match the category you entered on the Budget screen for this category type.

3. Click the "Save Changes" button.

4. To delete a service, click the 'Delete' button at the bottom of screen *(see Figure M2-50, page 51 above)*. The 'APC Service Summary' will appear with the service updated or deleted. To create another one, click the 'New' button and following the steps on the previous page.

APC Housing Transactions

The APC Housing is another administration component of the 'APC View' screen *(see Figure M2-51b)*. The APC Housing screens setup the housing categories that a client can enroll in.

There are two types of housing transactions; rent calculations (usually scattered site dwellings *(see Figure M2-51a)*, and non-rent calculated (usually facility-based housing *(see Figure M2-51a)*.

Housing Definitions

Scattered-Site - A scattered site is generally a landlord-based apartment dwelling, or residence-based housing type. This type is selected with household needs assistance with paying rent to a landlord. The rent calculations option should be selected if you want OPUS to calculate the rent a client would pay that takes in account their income, fair market rent, etc.

Facility-based - A facility-based housing type is typically a housing of either an apartment complex or rooms that is owned by the agency. Some rent is usually charge for this type.

Figure M2-51a: Housing Definitions.

You will need to set these preferences on the APC Housing Detail – New screen detailed below.

Setup: Start from the APC View screen.

1. Click the ‘View Housing’ button *(see Figure M2-51b)*. The ‘APC Housing Summary’ screen will appear. No housing categories have been entered yet for this APC, so none will be listed.

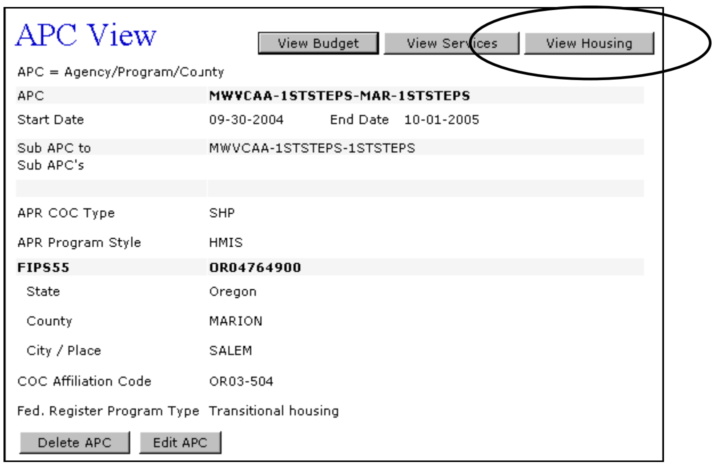


Figure M2-51b: APC View screen.

2. On the APC Housing Summary screen, click the ‘New’ button *(see Figure M2-52)*. The APC Housing Detail - New screen will appear next.

Figure M2-52: APC Housing Summary screen.

3. On the ‘APC Housing Detail-New’ screen enter or select the following: All fields marked * are required.

- **a.** Housing Type (see definitions above)
- **b.** Label
- **c.** Minimum Rent
- **d.** Maximum Rent
- **e.** Calculated Rent - Yes or No
- **f.** Budget Limit for the housing
  The ‘Budget Limit’ field should match the category you entered on the Budget screen for this category type.

4. Click the ‘Save’ button. In *Figure M2-53*, a scattered site is created with the option for the rent to be calculated as ‘Yes’. Therefore, when a household is enrolled in this transaction, the case manager will work through a series of screens that will calculate the rent based on several factors such as the household income, etc.

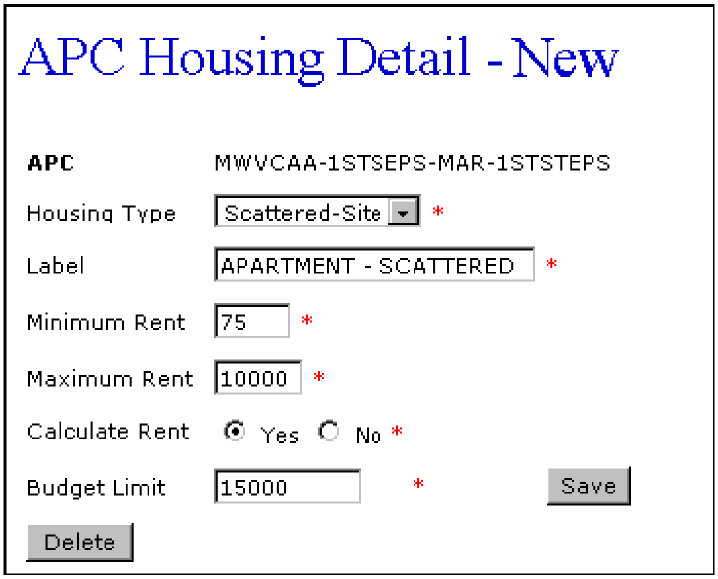


Figure M2-53: APC Housing Detail - New screen for a scattered site.

In *Figure M2-54*, a facility-based site is created with the option for the rent to not be calculated as ‘No’. Some facility-based sites charge clients rent and some don’t. In *Figure M2-54*, there is no minimum rent charged to a client for this example.

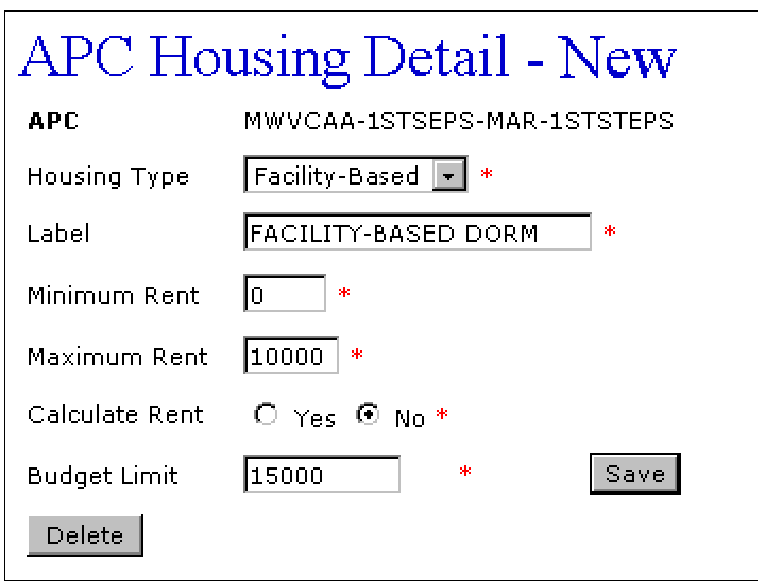


Figure M2-54: APC Housing Detail - New screen for a facility-based site.

The ‘APC Housing Summary’ will appear with each housing type created *(see Figure M2-55)*. There may be times when the APC needs to be edited. Follow the steps listed below.

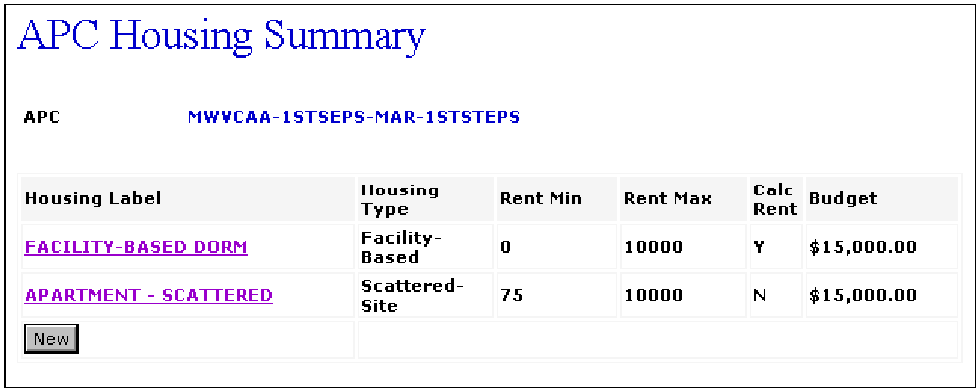


Figure M2-55: APC Housing Summary

APC Housing Detail - Edit

Setup: Start from the ‘APC Housing Summary’ screen.

1. Click the underlined link of the housing type you want to edit *(see Figure M2-56)*.

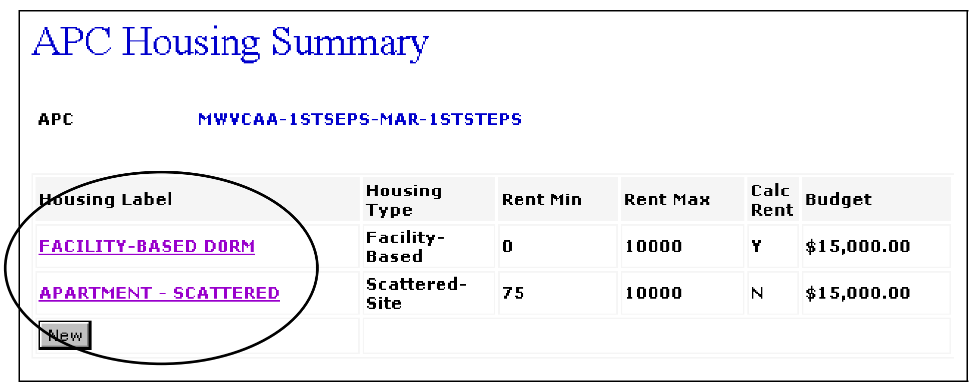


Figure M2-56: APC Housing Summary

The ‘APC Housing Detail – Edit’ screen will appear next *(see Figure M2-57, page 56)*.

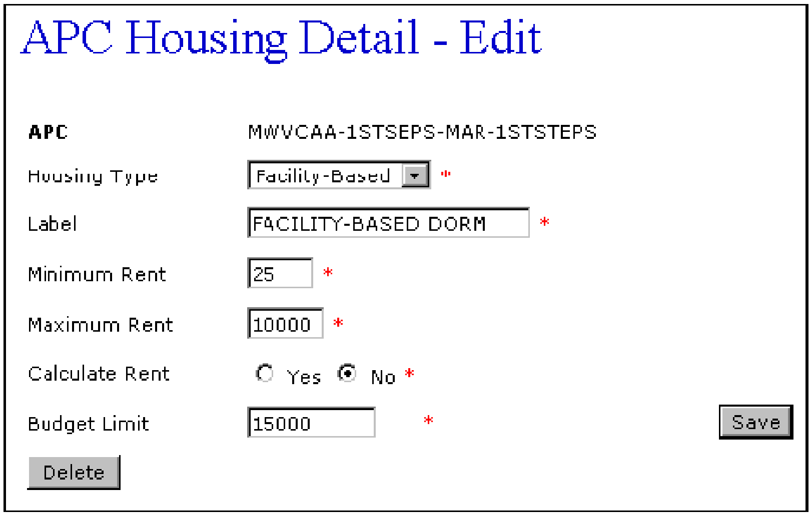


Figure M2-57: APC Housing Detail - Edit

2. The Facility Based site has decided that they will be asking for a minimum rent of $25.00. Enter and update the fields below. Enter or select the following: All fields marked * are required.

- **a.** Label name
- **b.** MIN limit and a Max limit
- **c.** A unit increment
- **d.** Unit Label
- **e.** Unit Dollar Value
- **f.** Budget Limit for the housing type

The 'Budget Limit' field should match the category you entered on the Budget screen for this category type.

3. Click the Save button. The 'APC Housing Summary' screen will appear next with the changes displayed on this screen *(see Figure M2-58)*.

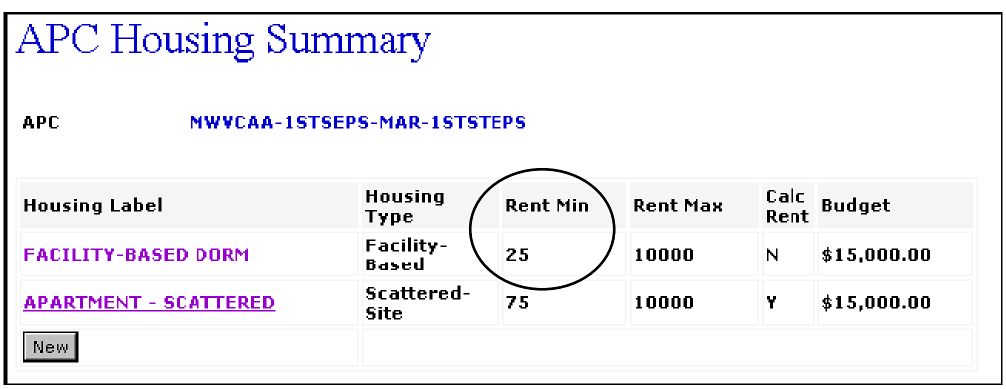


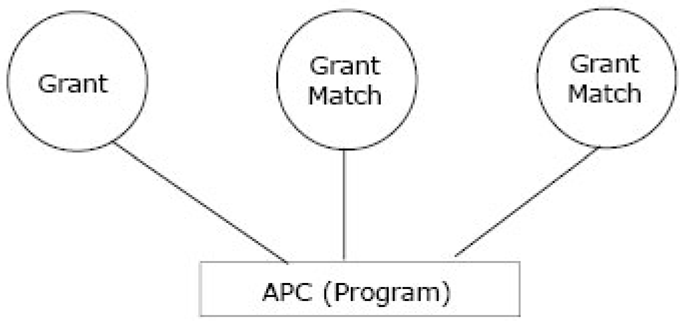
Figure M2-58: APC Housing Summary after Edit.

M3 Section
How to Fund a Program with Multiple Grants

The Grant APC Tree Structure to Fund Programs

In order for programs to be utilized in OPUS, an 'APC tree' structure must be established in OPUS which recognizes the programs for clients to be enrolled and receive services. APC stands for: 1-Agency, 2-Program, 3-County, and M2-Grant (refer to Section M2 in building APCs). An 'APC tree' structure includes the necessary components to allocate funds from a grant to a program. This section will detail the steps to fund a program with multiple grants. This diagram offers a visual representation one APC funded by multiple grant sources.

Grant / APC (Program) Tree Structure



Grant Setup

Begin by setting up each grant source and naming them by main grant and then match grant, Overage, or Other types. Review steps in section M2 on creating new grants. On the 'Grant New' screen, you will need to designate the grant type from the drop down menu *(see Figure M3-1)*.

In this example, the following grant sources will be used and designated (in parenthesis):

1. HOPE CoC Grant (HMIS CoC)
2. HOPE CoC Grant Match**1** (HMIS CoC Match)
3. HOPE CoC Grant Match**2** (HMIS CoC Match)

For this example, the main grant is HOPE CoC Grant. Allocate the grant amount by clicking the Grant Allocation button the Grant View screen. Enter grant amount and save.

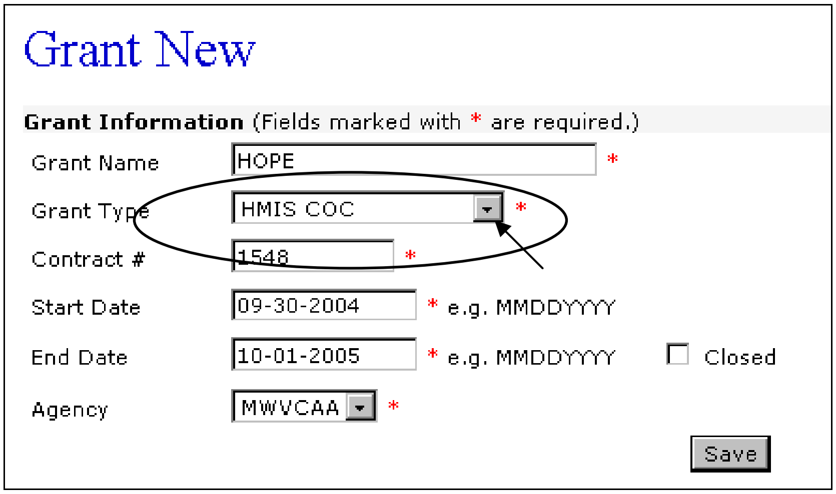


Figure M3-1: Main Grant Source designated as HMIS CoC type.

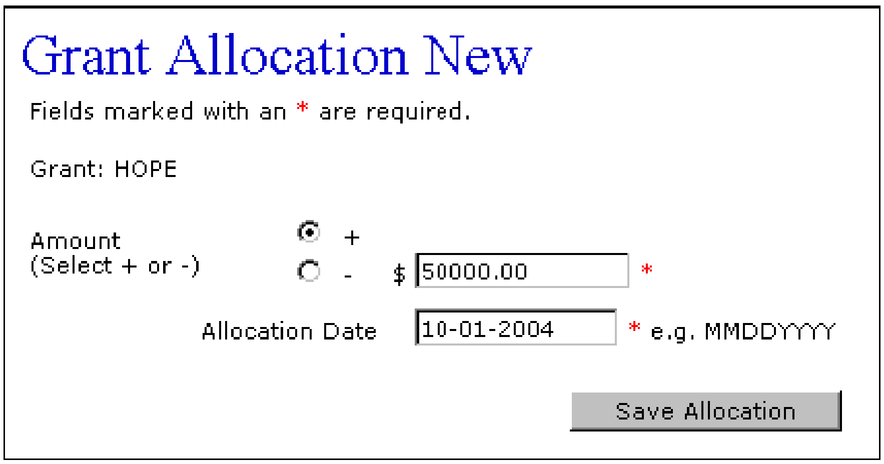


Figure M3-2: Grant Allocation to Main Grant

Figure M3-3: Grant Allocation to Main Grant

Next, create the other grant match sources as a new grant. Make sure to designate them with the HMIC CoC Match type. On the 'Grant View' screen, allocate grant funds to each grant match source as well *(see Figure M3-5)*.

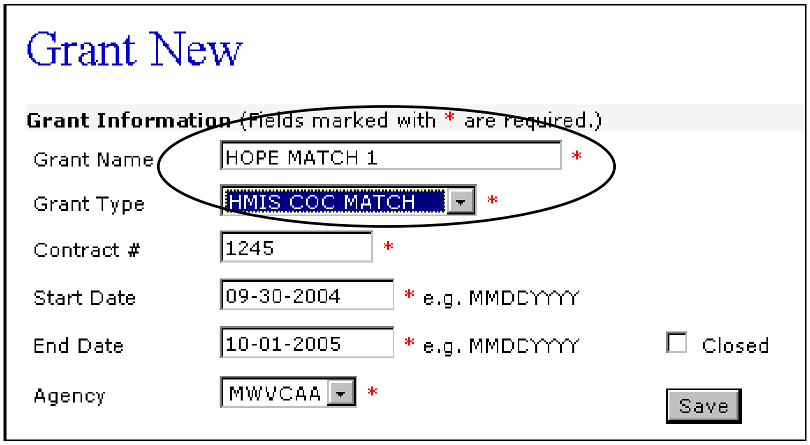


Figure M3-3: Match 1 Grant Source as a HMIS COC type.

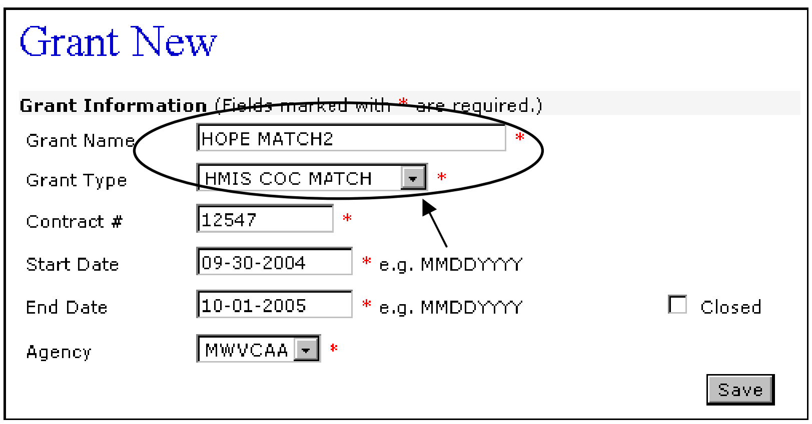


Figure M3-4: Match 2 Grant Source as a HMIS COC type.

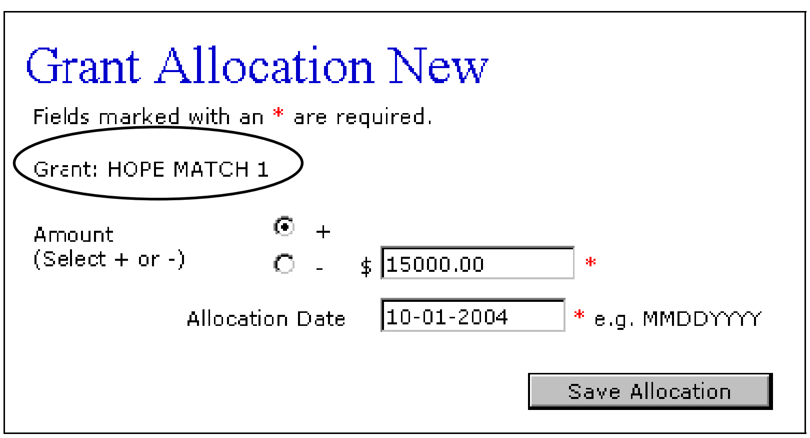


Figure M3-5: Grant Allocation New to the Match Grant.

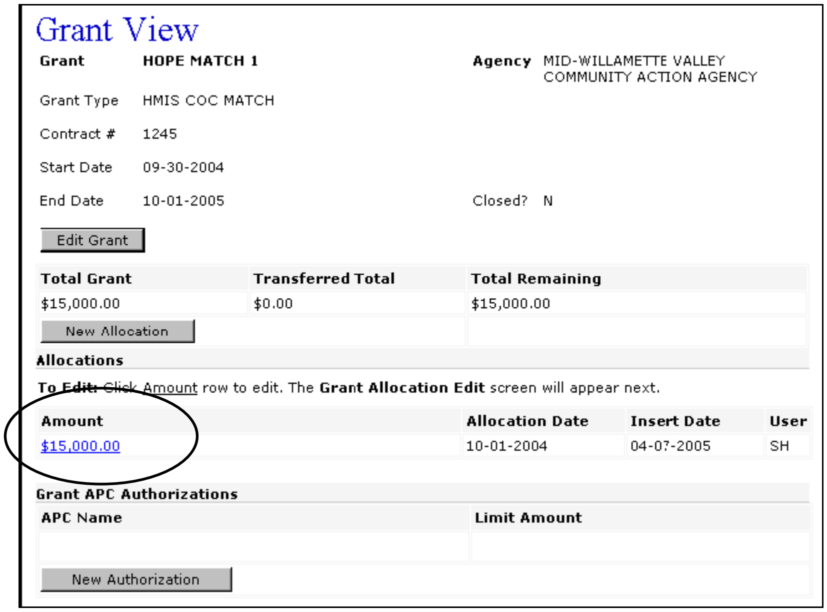


Figure M3-6: Grant View of Match1 after allocation.

Program Setup

Verify that the program you need to work with exists in the database. Search for the Program on the Program Search/View screen under Management in the top navigation bar. If not found, create it using the guidelines in the M2 Section titled 'Program New'.

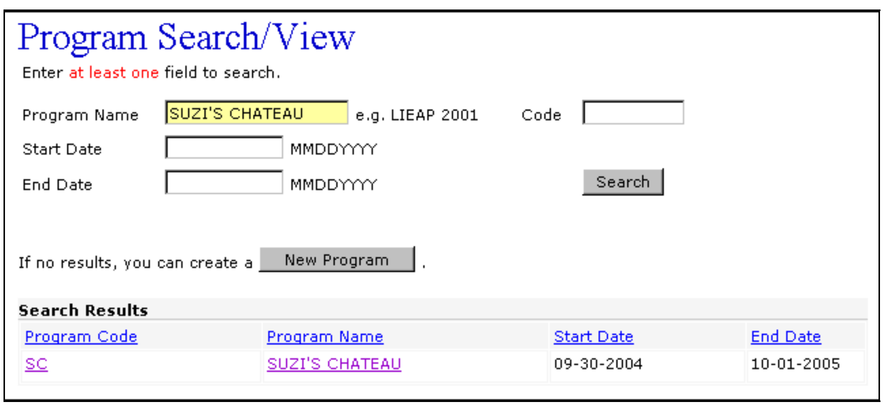


Figure M3-7: Program Search

APC Setup

Search to verify the APC you want to use doesn't already exist in the database. Search by using the 'APC Search' screen *(see Figure M3-8)*. If no matches are found, continue building the APC using the guidelines in the next section.

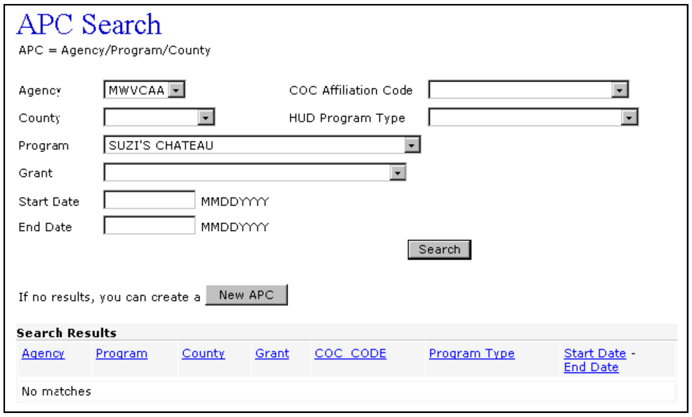


Figure M3-8: APC Search

New APC **(aka Program)**

Search to make sure the APC you want to use isn't already setup in the database. Search for the APC on the APC Search screen *(Figure M3-9)*.

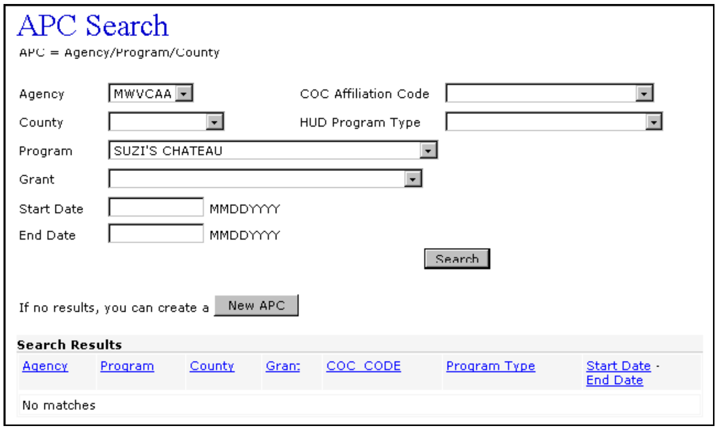


Figure M3-9: APC Search

New APC

To fund one program you only need one APC created.

Setup: You are on the APC Search screen.

1. Click the 'New APC' button. The APC New screen will appear next *(see Figure M3-7, page M3-61 above)*.

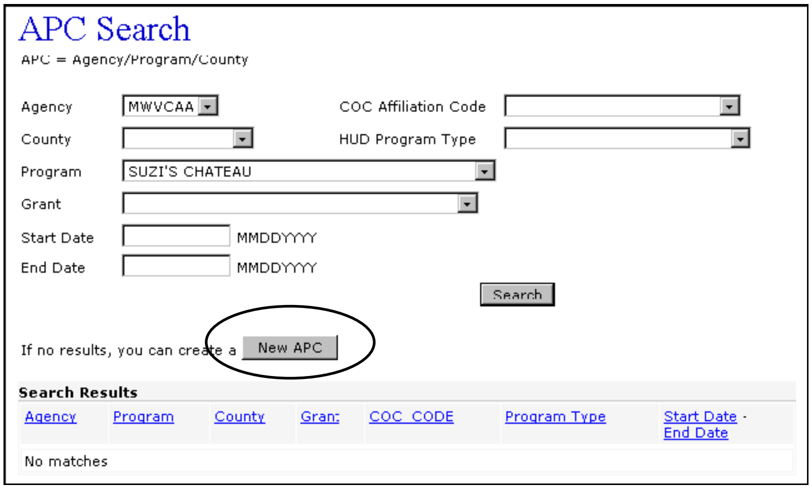


Figure M3-9: APC Search

2. Select the following Options. **Note**: It's very important that the 'Main Grant' is selected for the ONE APC/Program.

   a. Select Agency
   b. Leave sub-Agency blank unless it is a 'Child APC' *(see Figure M3-10)*.
   c. Leave 'County' blank unless it is a 'Child APC' *(see Figure M3-10)*.
   d. Select Program name
   e. Select 'Main Grant' name (not match).
   f. Select the APR type
   g. Select the appropriate options under the FIP55 section.
   h. Click 'Save' button.

The APC View screen will appear next. Complete budget, services and housing sections for this APC (program). When done, you'll learn to allocate funds from the grant sources to the APC.

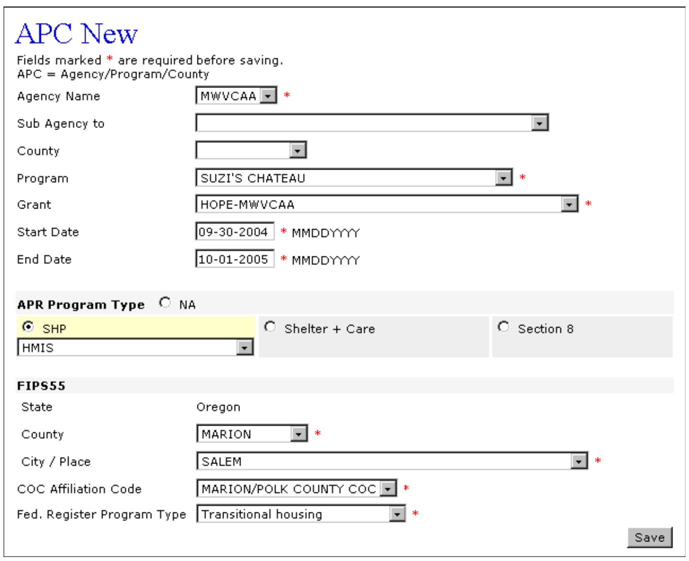


Figure M3-10: APC New screen designated with the Main Grant.

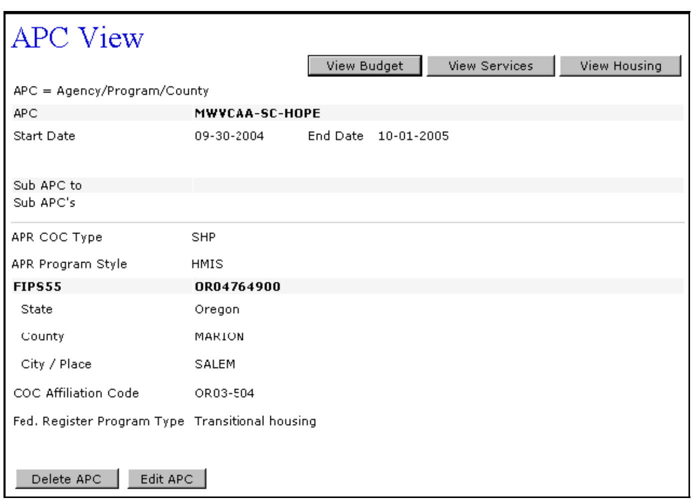


Figure M3-10: APC New screen designated with the Main Grant.

Grant Authorization to APC (one Program)

Step by step, you will authorize funds to be drawn down from each of the grant sources to the one APC (program).

Setup: Working from the last section, you are on the APC View *(figure M3-10)*.

1. From the main menu, scroll your mouse over 'Fiscal' (top navigation bar) and click on Grant. The 'Grant Allocation Search' screen will appear *(see Figure M-11).*

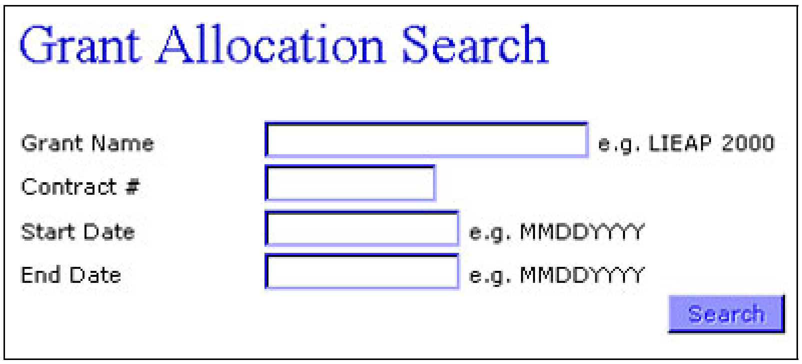


Figure M-11: Grant Allocation Search

2. Enter the Grant Name and click on 'search'. The 'Grant Allocation Search' screen will appear. 3. In 'Search Results', click on the grant name you will be working on *(see Figure M3-12)*.

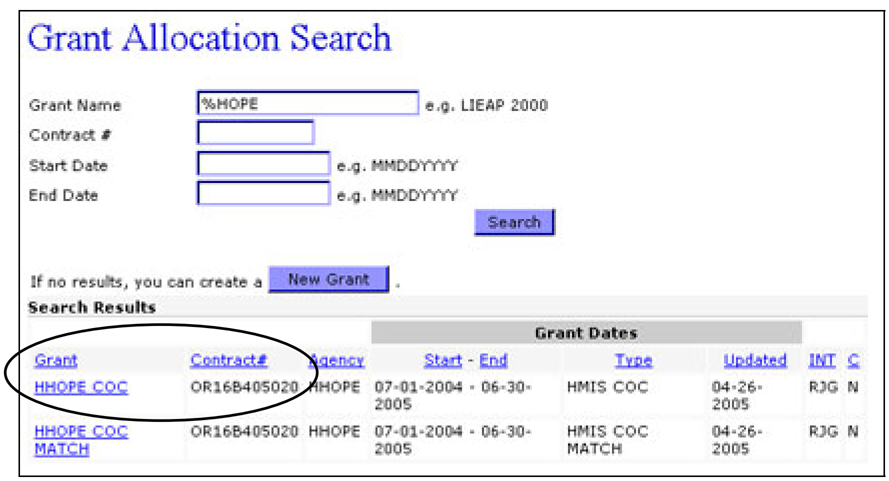


Figure M3-12: Grant Search

3. On ‘Grant View’, click the “New Authorization” button, the ‘Grant APC Authorization New’ screen will appear next *(see Figure M3-13)*.

Figure M3-13: Grant Allocation View

4. For Main Grant, the only APC available will be the one APC in the ‘APC Select’ menu. Select it.

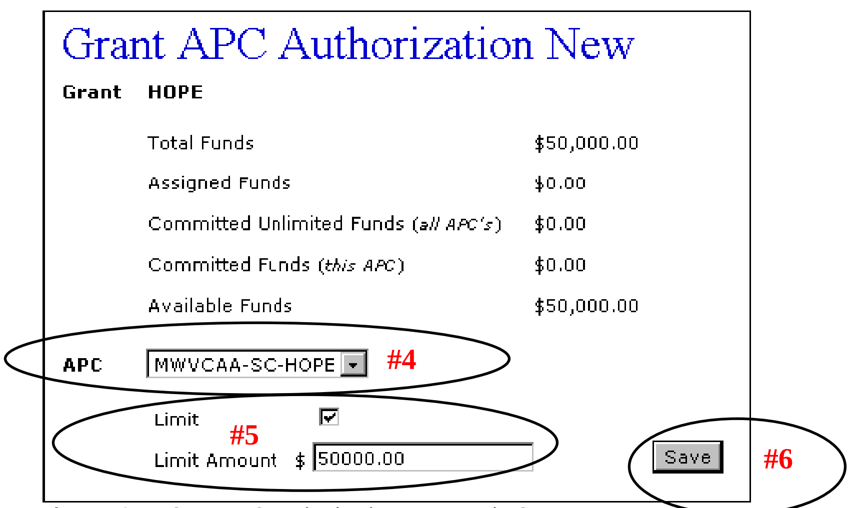


Figure M3-14: Grant APC Authorization New - Main Grant

5. If you want to limit the funds to a fixed amount of the grant so that it isn’t over spent, then check the box and enter the grant amount.

6. Click the ‘Save’ button. The Grant View screen will appear next with the authorization completed in its section *(see Figure M3-15)*.

Each of the match sources will be done next with specific instructions as follows:

7. From the main 'Grant Allocation View' screen, click the 'Search' link on the left navigation bar and search for a grant match source.

Figure M3-15: Grant Allocation View 'Search'

8. In the 'Grant Allocation Search' screen, click on 'New Grant' link above 'Search Results'. The 'Grant New' screen will appear *(see Figure M3-16)*. Using the 'Grant Type' down arrow will allow you to choose the 'match type' this is where the 'Grant Type' *(Figure M3-16a, page M3-68)*.

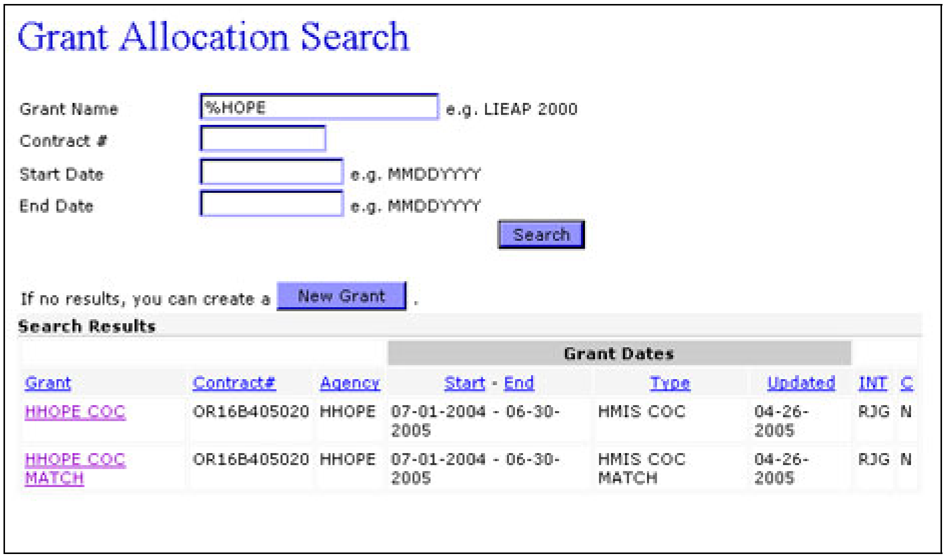


Figure M3-16: Grant Allocation Search – New Grant link

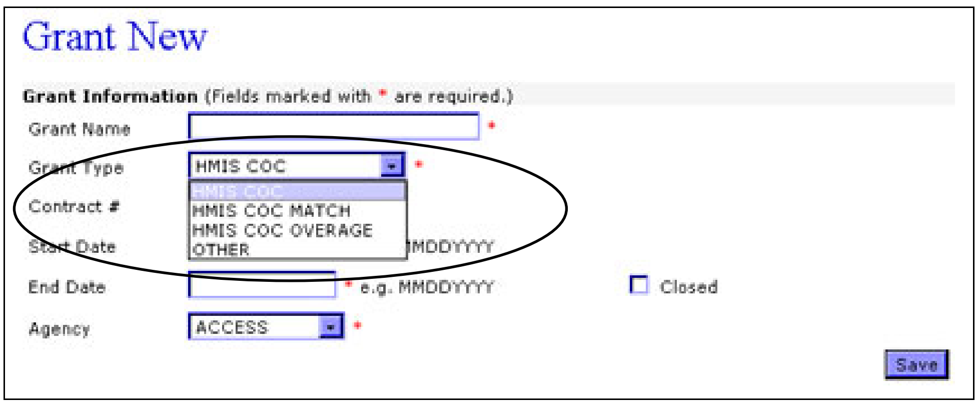


Figure M3-16a: Grant Search - Match Source

9. Click the 'New Authorization' button. The 'Grant APC Authorization New' screen will appear next. Follow the steps carefully.

Figure M3-17: Grant View - Match Source

10. On the 'Grant APC Authorization New' screen, select the One APC created earlier in this tutorial *(see Figure M3-15)*.

11. Select the 'Limit' box <u>ONLY</u> if you want to limit the funds to this Match source to not over spend it.

12. Enter the limit amount if needed.

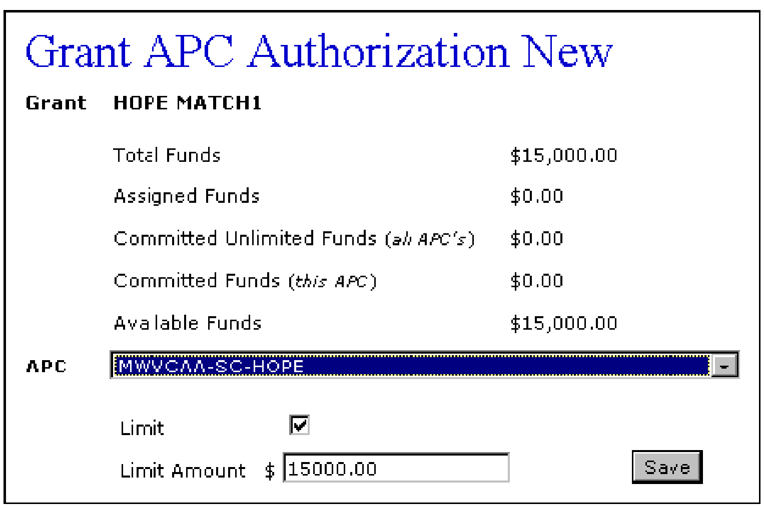


Figure M3-15: Grant APC Authorization New - Match Grant

13. Click the 'Save' button. The Grant View screen will appear with the authorization amount displayed in the 'Grant APC Authorizations' section *(see Figure M3-16)*.

Figure M3-16: Grant View - Match Grant after Authorization

For each grant match source, repeat Steps 7-13 above.

When done authorizing grants to the APC, continue tutorial on next page. *'Figure M3-16: Grant View'* is a view of a Match Grant after authorization.

Assigning Grant Funds to Service and/or Housing Transactions

All the previous section were necessary in order to assign grant funds for use in service and/or housing transactions in which a case manager enrolls a household into a service or housing transaction and needs to associate the transaction to either one or more than one grant source.

Case Manager Example:
As a case worker enrolls a household into a service such as a food boxes, the grant sources will be displayed at the end of the 'Service Transaction New' screen. The case manager enters the dollar amounts to spend from each grant source as required *(see Figure M3-17)*. The grant assignment area will be displayed on the housing transaction screens as well so that housing costs can be spent from multiple grant sources as needed, and is in compliance with the Agency's HMIS-CoC work plan.

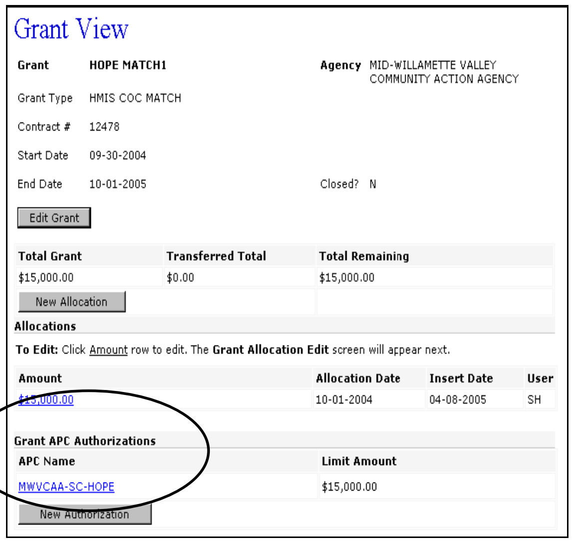


Figure M3-16: Grant View - Match Grant after Authorization

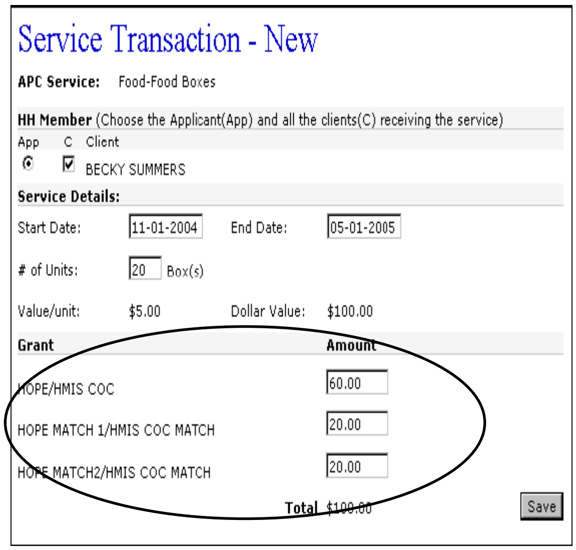


Figure M3-17: Assign amounts to grant sources for a Service Transaction.

OPUS and the APR Report

Section 4 - HUD APR Report

The OPUS system generates an APR report dynamically and pulls aggregate client data from the OPUS database. The following guidelines detail the steps necessary in accessing the APR report and how to generate it.

User Roles in OPUS

The OPUS system is designed for users to have specific roles and permissions to access certain screens and functionality within the system. An OPUS user who needs to view, run or have access to an APR report in OPUS needs to have the 'Reports' role. Your agency OPUS Administrator can grant this role and the appropriate report permissions.

The 'Reports' Role

The OPUS Administrator for the agency will need to assign the report role and grant report permissions for each user needing to access to the HMIS-COC reports.

Follow the steps below to do this:

1. Search for the user on the 'User Search' screen.

2. On the 'User's View' screen, click the 'Edit Roles' button *(Figure 5-1)*.

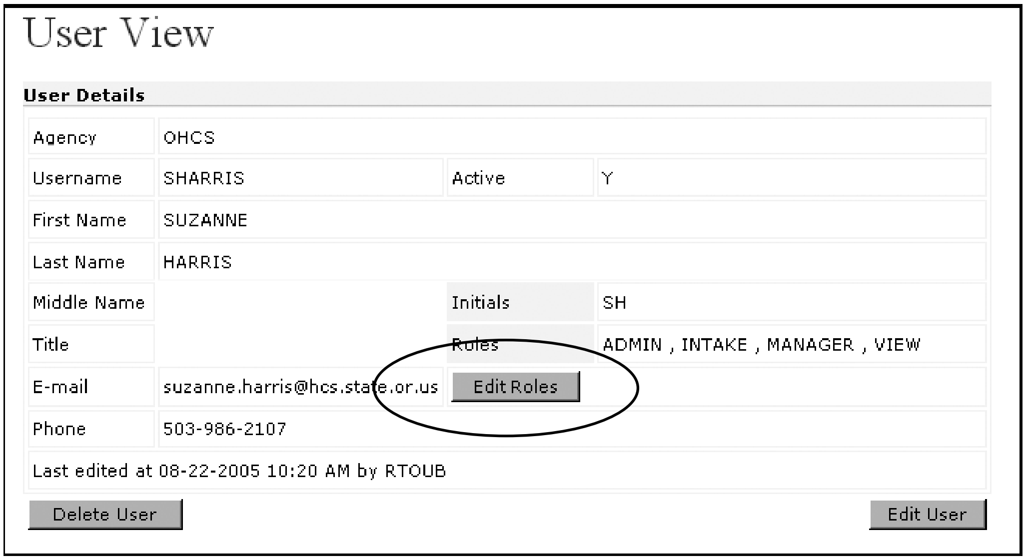


Figure 5-1: User View

3. On the 'User Role Edit' screen, the 'Report' role is listed among the other roles. Click the radio button next to the 'Reports' and click the 'Update' button *(see Figure 5-2)*.

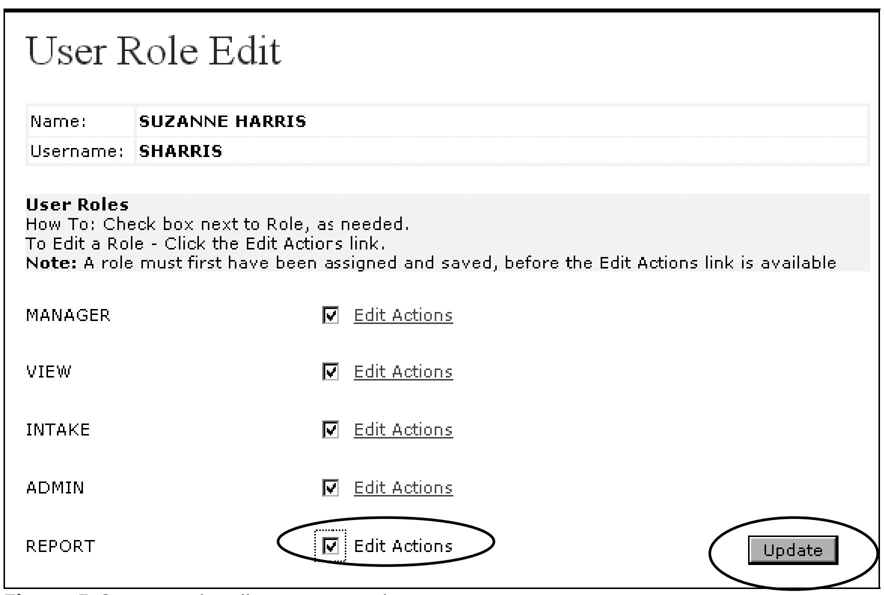


Figure 5-2: User Role Edit - Reports Role

4. The ‘User View’ screen will re-display. **Note:** Initially, when the ‘Report’ role is selected and assigned to the user the first time, by default, all report permissions are in the ‘allowed state’. To customize permissions for a user, click the ‘Edit Roles’ button *(Figure 5-3)*.

Figure 5-3: User View

5. On the ‘User Role Edit’ screen, click the link ‘Edit Actions’ next to the ‘Report’ role *(Figure 5-4)*. The ‘User Action Edit’ screen will appear *(see Figure 5-5)*.

Figure 5-4: User Role Edit

6. On the 'User Action Edit' screen select the actions needed for the user. Click the 'Save' button and the 'User Role Edit' screen will display. Click the 'Update' button and the 'User View' screen will display *(reference figure 5-3, page 2)*.

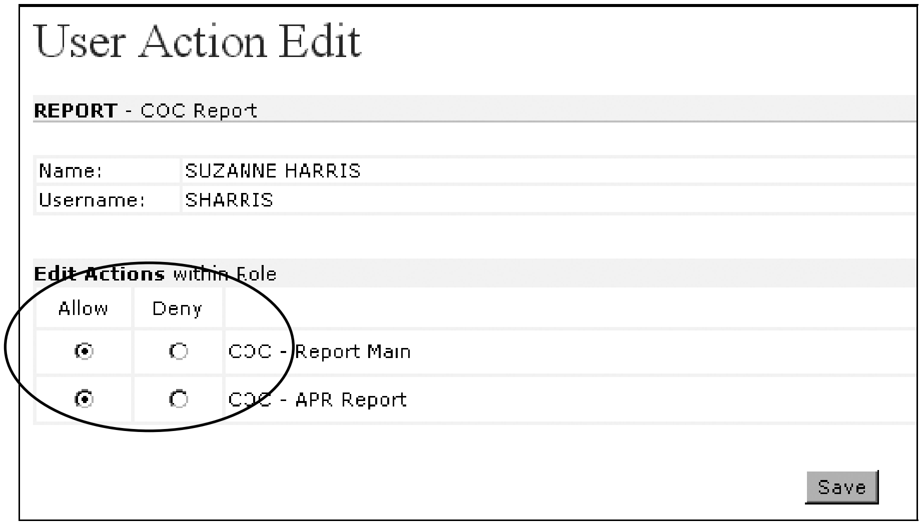


Figure 5-5: User Action Edit

REMINDER:
The 'CoC-Report Main' action is the HMIS-COC report screen that outlines all the reports available for the HMIS-COC module *(Figure 5.7)*. Anyone having the reports role needs this action 'Allowed' in order to have any access to individual reports. Refer to: ***M1 Section User Role and Permission Setup*** to assign roles permission. Once you have allowed access to the reports role and given the respective report actions, the 'Reports dropdown' menu will display from the OPUS Main Menu *(Figure 5-6)*.

The APR Report

On the OPUS Main Menu, roll the mouse over 'Reports'.

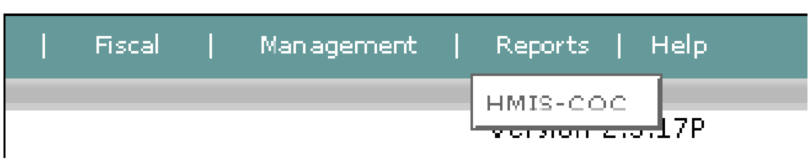


Figure 5-6: Reports drop-down menu

A drop-down menu will display the label 'HMIS-COC' *(Figure 5-7)*. Click 'HMIS-COC', and the 'HMIS-CoC Reports' screen will appear *(Figure 5-8)*. Within available reports is the 'HUD APR' link. Click the 'HUD APR' link *(Figure 5-8)*. The 'APR Report' screen will appear *(Figure 5-9, see next page)*.

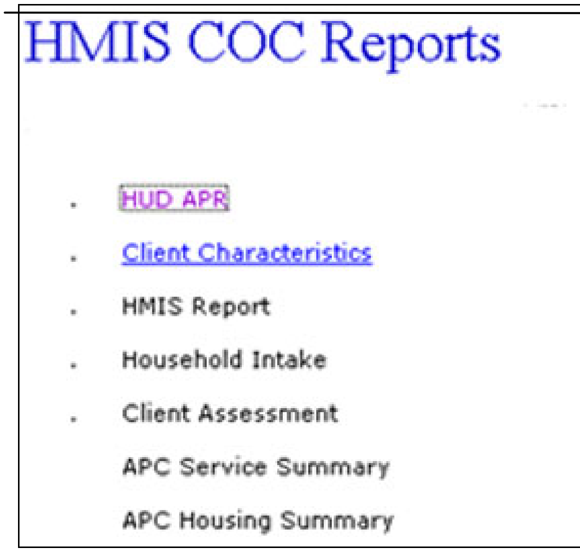


Figure 5-7: Reports Screen – Outline

To Run an APR Report, follow these steps:

1. Select an APC from the drop down menu.

2. Click the Load button *(Figure 5-8)*. The screen will refresh and display the default program 'start' and 'end' dates *(Figure 5-9)*. Dates can be adjusted as needed. Click the Submit button.

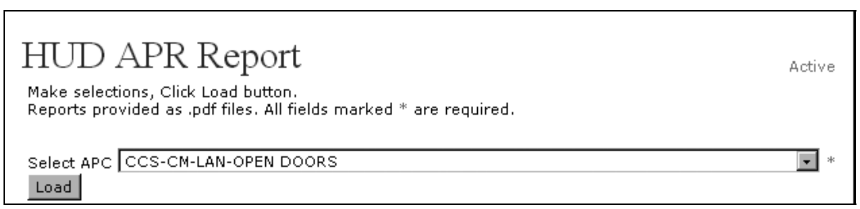


Figure 5-8: APR Reports Screen - APC Select

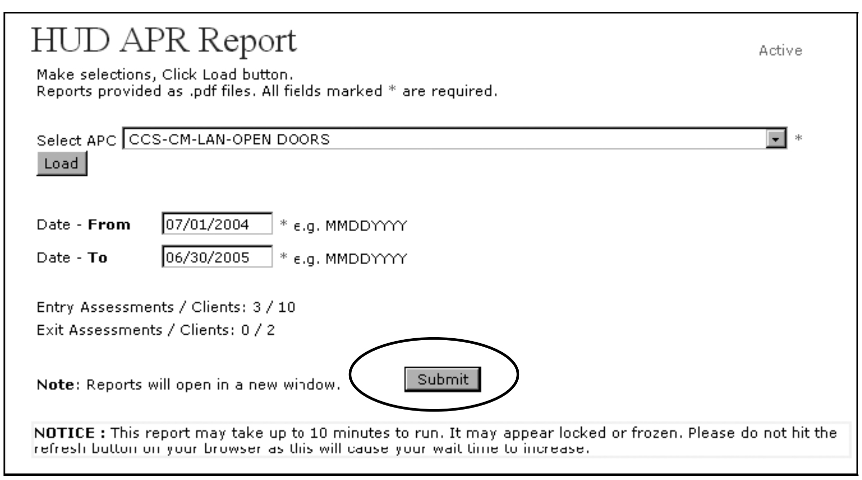


Figure 5-9: APR Reports Screen - After APC Load.

3. The APR report uses an I-Net Crystal Clear JavaClient plug-in to run reports (custom software). A popup window will ask if you want to run and/or install this plug-in. You will need to click **Run or Always** *(Figure 5-10)*.
4. The APR report will open in a new window *(see Figure 5-10).*

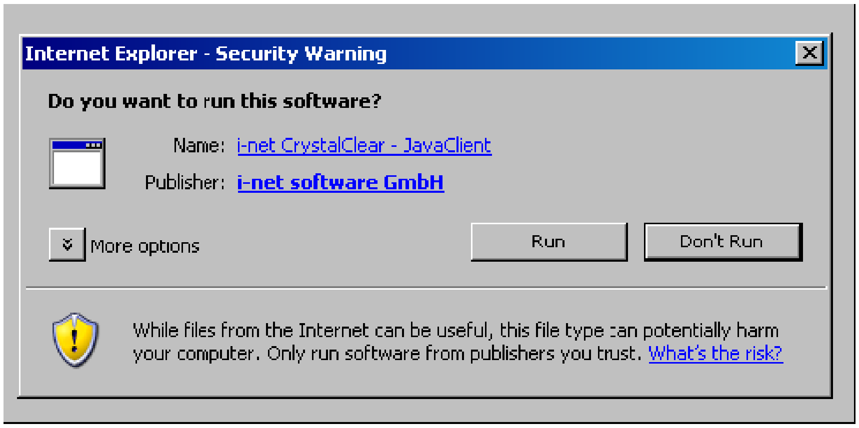


Figure 5-10: I-Net Crystal Clear JavaClient Plugin Popup.

Assessment Count Analysis

Under the 'Start' and 'End' dates, there is an area with 'Entry' and 'Exit' assessment counts *(Figure 5-10)*. The following explains these counts:

Entry Assessments

There were 10 clients enrolled in the program. Out of the 10 enrolled, 3 clients had a completed entry assessment.

Exit Assessments

There were 2 clients exited from the program. Out of the 2 clients who exited, 0 clients had exit assessments completed.

Note: The 'Entry Assessment' collects income, last residence, homeless, at risk, chronic and special needs. 'Program Exit' screen collects destination and exit income analysis for the APR report. The exit assessment screen isn't programmed to collect anything. Therefore, to collect the needed information, be sure to use the 'Entry Assessment' and 'Program Exit' screens to gather this data.

Saving the APR Report

Once the APR report is displayed in a new window *(Figure 5-11)*, it can be reviewed and then saved as a file to be opened later in a word processing document.

To Save an APR Report, follow these steps:

1. With an APC report generated, click the 'Export Report' icon at the top area of the screen *(Figure 5-11)*. This will open an 'Export' window *(Figure 5-12)*.

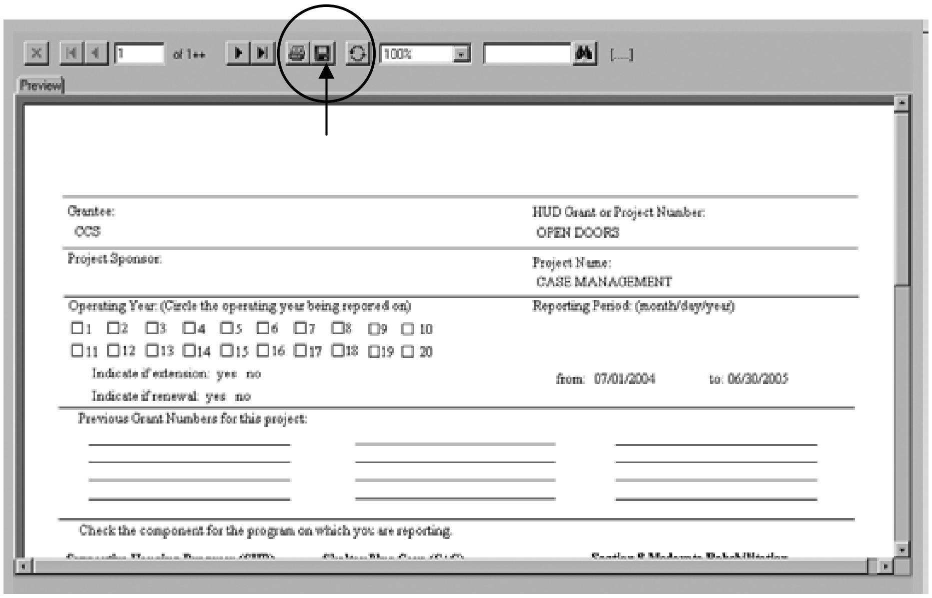


Figure 5-11: A generated APR report.

2. The Export Window has two boxes to be completed. The first one is the 'Export Format' box. Select the ".RTF" file format. The 'RTF' format is the file format that can be opened by a word processing program *(Figure 5-12)*.

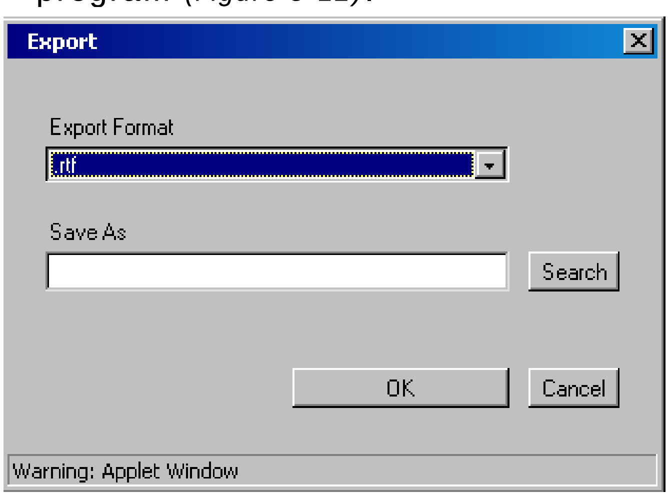


Figure 5-12: The Export popup window.

3. The second box is for naming the file. Use the search button to find a location where you want to save the file such as to your computer's desktop, a shared folder, etc. **It's important** that you remember where you saved the file after this point, so you can find it later when trying to open it with a word processing program. Click the 'Search' button. A 'Save As' window will open *(Figure 5-13)*. Select the correct folder for the file to be saved to and type the file name in the 'File name' box with the .rtf extension then click the 'Save' button *(Figure 5-14)*. The 'Export' window will re-appear. Notice the second box now has the complete file path to where the file was saved. If you don't see anything in this area, then repeat Step 3 above.

Figure 5-13: The Export popup window.

4. When done, click the OK button *(Figure 5-14)*. When the report is finished saving, you'll get a popup window saying 'Export Completed'. Click the OK button *(Figure 5-15)*.

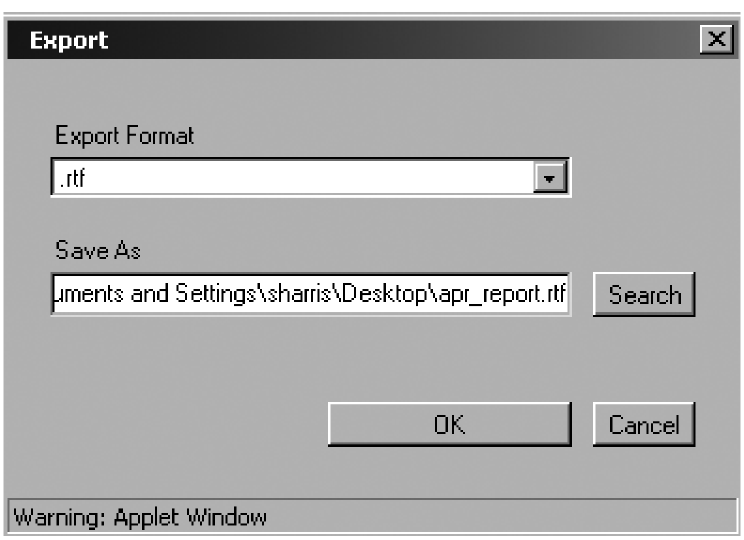


Figure 5-14: The Export popup window with file path.

Figure 5-15: Export Complete popup

Modifying an APR Report with Word Processing Software

Once the APR report has been saved, you will be able to use a word processing program such as Microsoft Word to open the .RTF file you saved in the previous steps.

To Open an APR Report, follow these steps:

1. Open a word processing program *(go to 'file' then to 'open').* In the following examples, Microsoft Word will be used *(Figure 5-16)*.

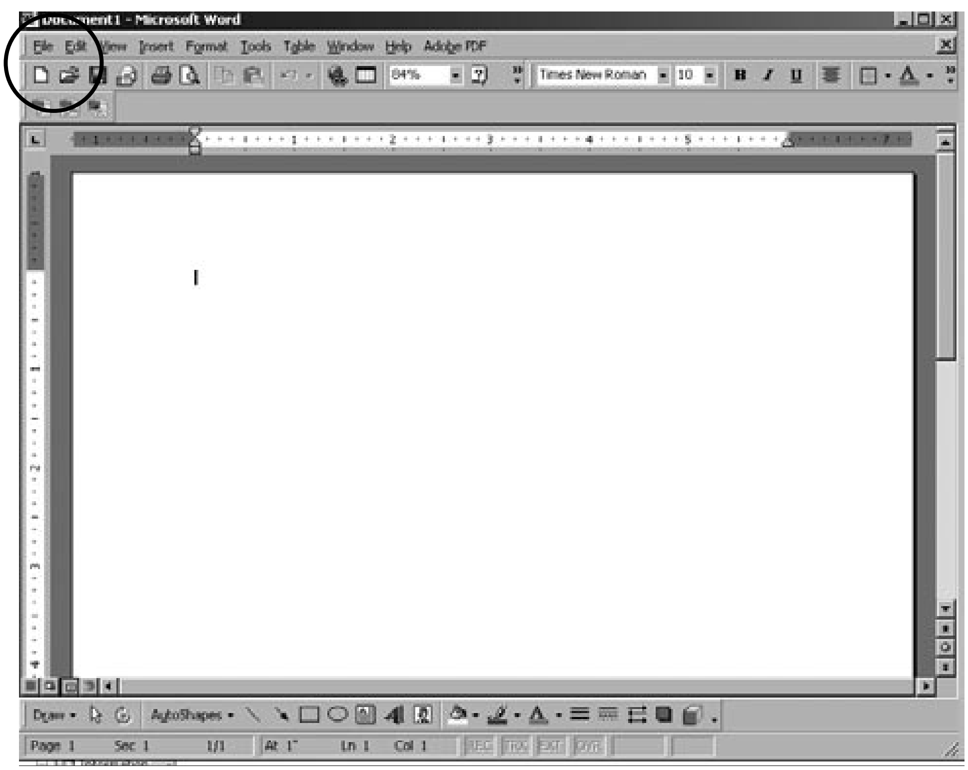


Figure 5-16: Microsoft Word blank document screen.

2. On the Main menu, click the ‘Open’ icon, locate the desired .RTF file. Double click or do a right click, go to ‘open’ *(Figure 5-17)*. The report will open in a MS Word window *(Figure 5-18)*.

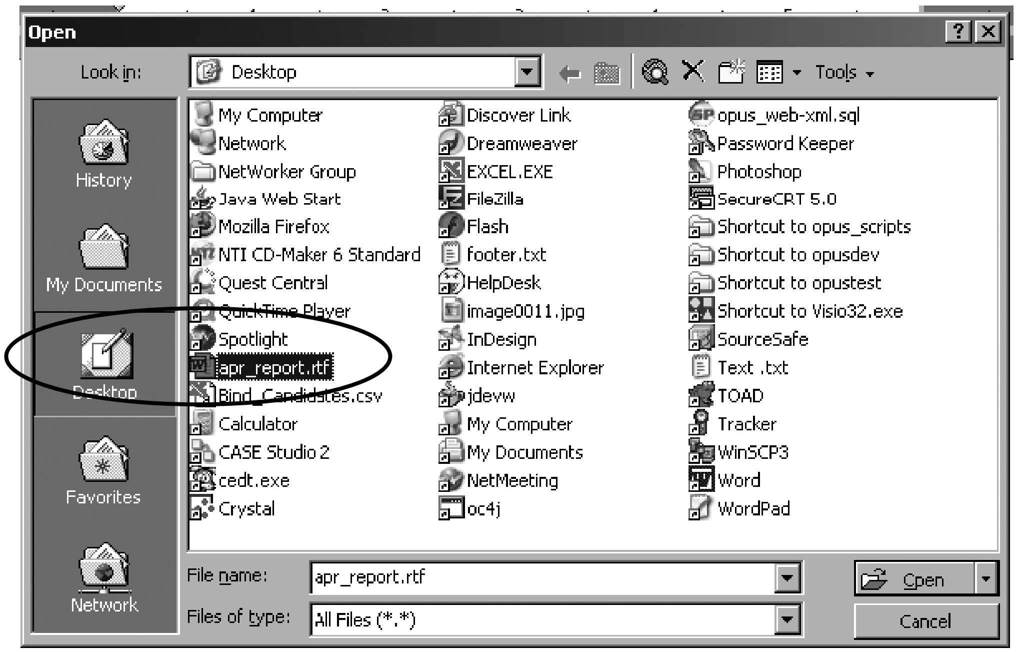


Figure 5-17: Open window

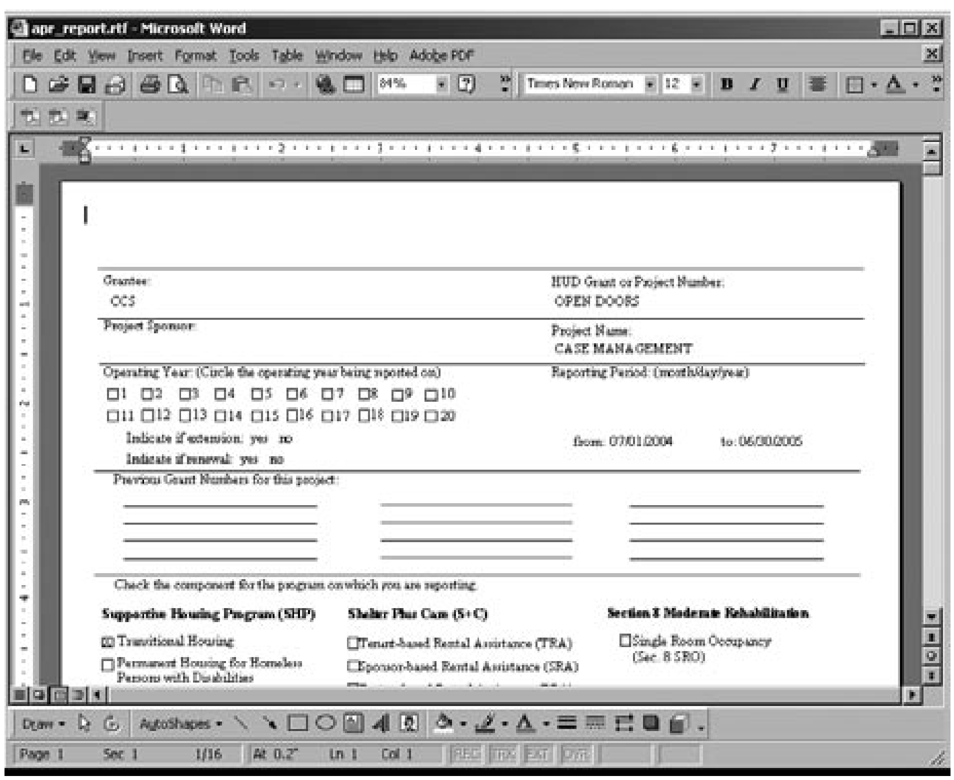


Figure 5-18: An APR Report opened in MS Word.

Once the APR report has been opened in MS Word, you can click some of the text areas. Notice that the document isn't your 'normal' word file. The .RTF file generated from OPUS isn't a 'native' document created in Word. During the export process from OPUS, the document is created with several individual text boxes. Essentially, wherever there is text, the text is contained in its own text box *(Figure 5-19)*.

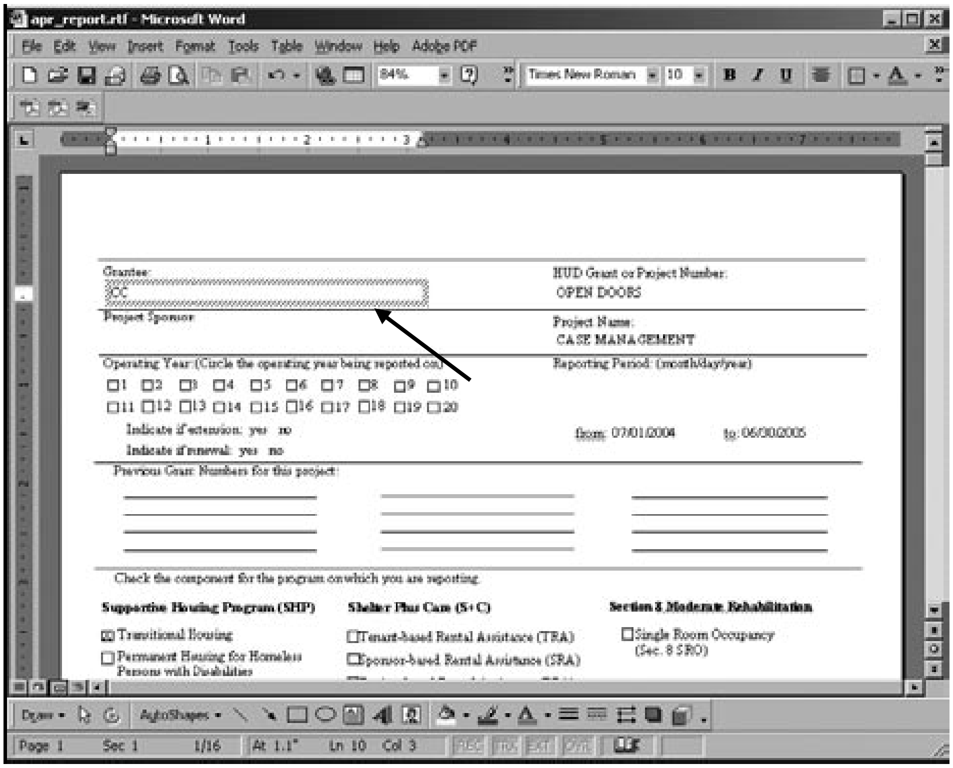


Figure 5-19: Text selected on the report.

In MS Word, text boxes can be resized to a desired length or width. Click on a border of a text box and little dots around the text box will appear displaying the text boxes' border *(Figure 5-19, above)*.

These black dots can be clicked on, held and dragged to stretch the text box wider or taller as needed *(Figure 5-20)*. If a special character or symbol such as a checkbox is needed, go to the main menu and click Insert, then click Symbol and choose the symbol needed. For more guidelines on using Text Boxes and Symbols in MS Word, refer to MS Word's Help menu. Search for these keywords in the Help index.

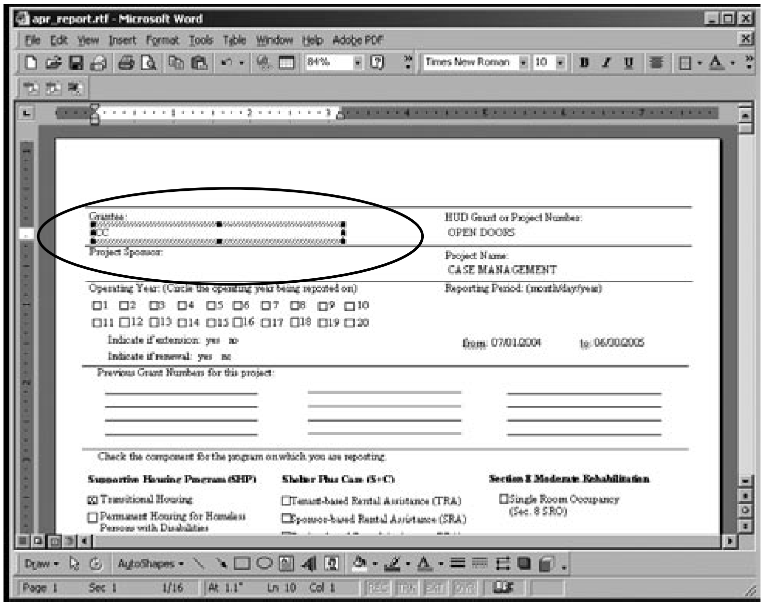


Figure 5-20: Text box dots to stretch dimensions.

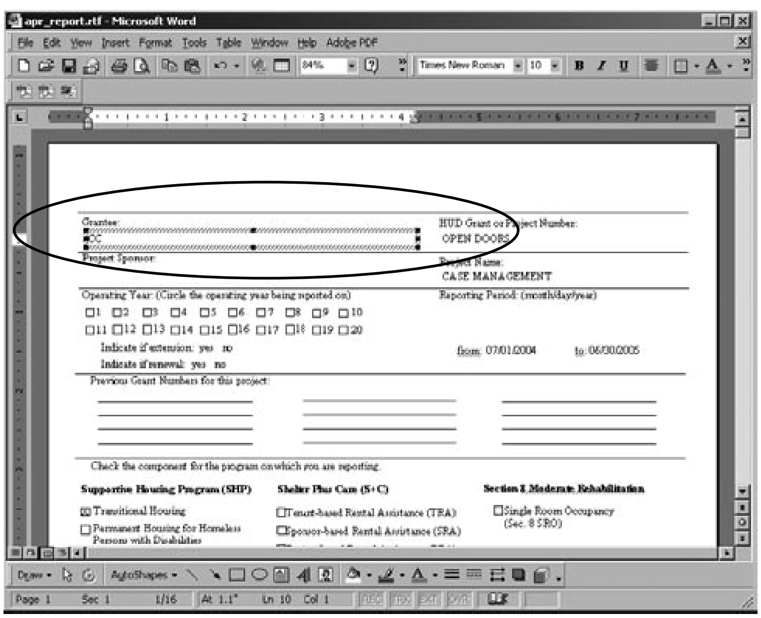


Figure 5-21: Text box dots to stretch dimensions.

IMPORTANT NOTE: As you fill in these text boxes in the report, the available space to use is confined to the text box borders. Filling in text boxes with content doesn't make the items below it scroll down like a 'Native' MS Word file would.

Recommendations for Using the APR File

In Sections 1-15, these pages are dynamically generated by the OPUS database as aggregate counts. In Sections 16 and beyond, these sections are completed with extensive content by agencies related to their goals, strategies, etc. The additional content needs space that a 'native' Word file provides, so that text can be added freely, and the text automatically scrolls down and moves things below it down. It is recommended that you print out Sections 1-15 generated by the OPUS system, and collate these pages with the current APR document from the HUD website for Section 16 and beyond.