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1 May 2013

CHANGE 2 to Weatherization OPUS User Manual dated January 02, 2013

INSTRUCTIONS:

Replace Pages 39-40 (old) with Pages 39-40 (Revised 05/01/2013)

Replace Pages 53-56 (old) with Pages 53-56.1 (Revised 05/01/2013)

Replace Pages 159-160 (old) with Pages 159-160 (Revised 05/01/2013)

PLACE A COPY OF THIS MEMORANDUM IN FRONT OF THE TABLE OF CONTENTS PAGE INSIDE YOUR WEATHERIZATION OPUS USER MANUAL.

EQUAL HOUSING OPPORTUNITY

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

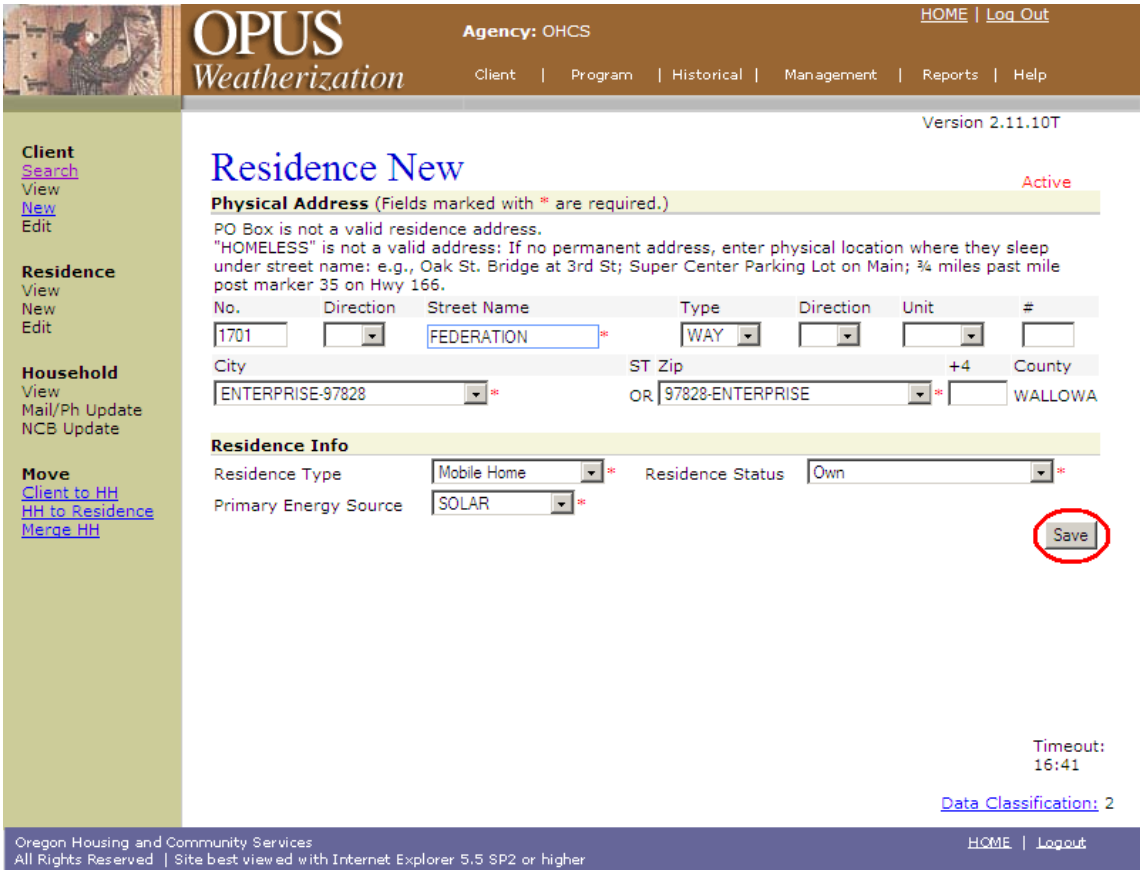

Figure 2-14: Client Search, Residence New Search – no results found.

6. Fill in the residence information. *Fields marked with * require responses to be selected*. There are several buttons with dropdown arrows for different choices and click on the 'Save' button *(reference figure 2-14)*. **NOTE:** PO Box is not a valid residence address. Also, "HOMELESS" is not a valid address. If no permanent address, enter physical location where they sleep under street name: e.g., Oak ST, Bridge at 3rd St; Super Center Parking Lot on Main; ¾ miles past mile post marker 35 on Hwy 166.

Verifying Data on Views

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

Add Clients to Household

Adding clients to an existing household is easiest when at least one client and the residence have been created initially *(reference figure 2-15)*.

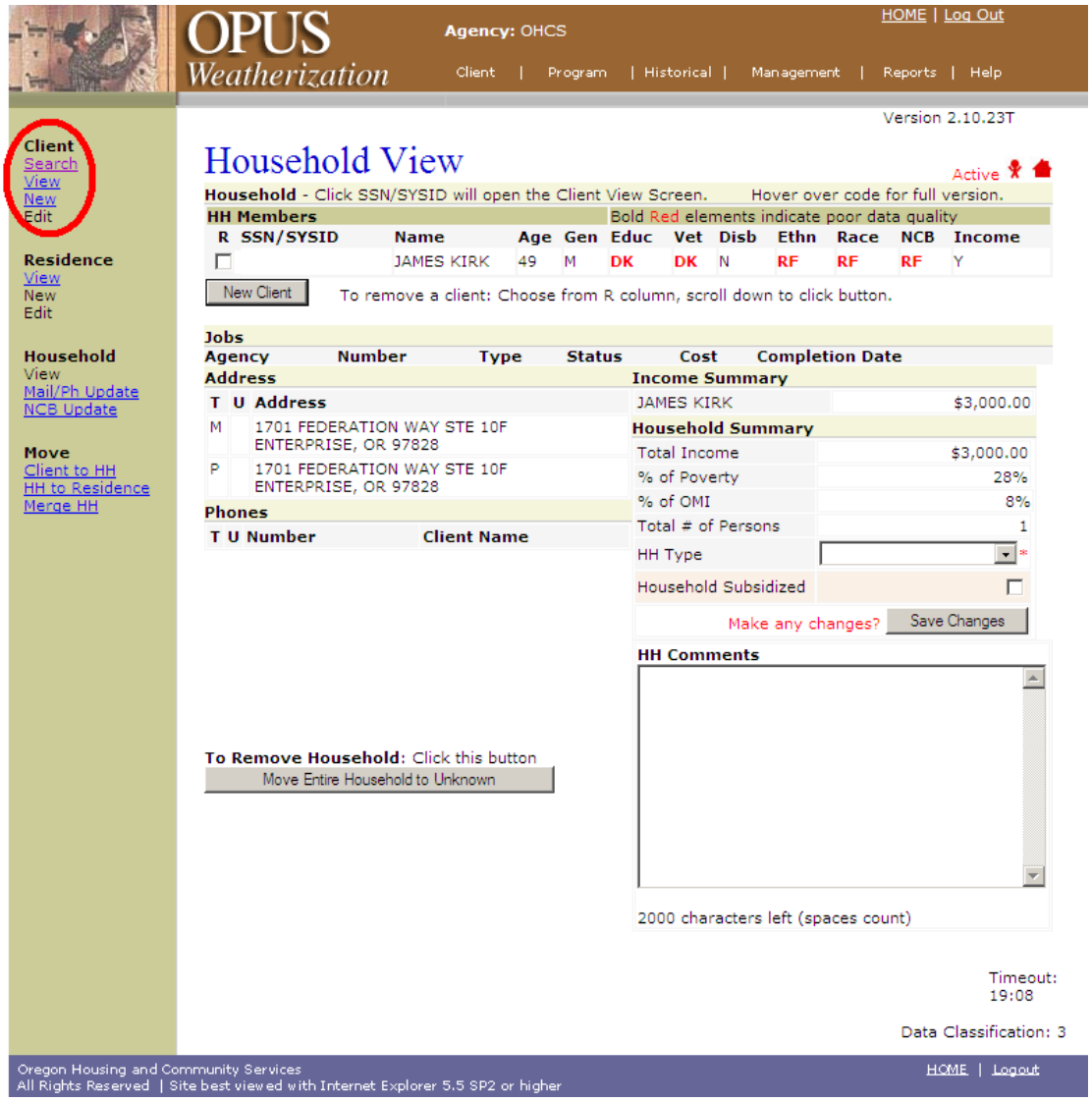

Figure 2-15: Adding new client to HH

Setup:

On the 'Household View' screen:

1. On the Left Nav Bar, under 'Client', click the 'New' link. The 'Client New' screen will appear. If the client's HH member is not listed, click 'Add New Member' (*reference figure 2-16).*

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

- If the residence is not in the result list, you'll see 'No Results Found'. You can begin creating a new household and a new residence *(reference figure 3-7)*. When household members have not been found in the database, click the 'New' link under "Client" on the Left Nav Bar. The goal is to find any records from the client's application first, and find out which household members already exist in the database before creating new records.

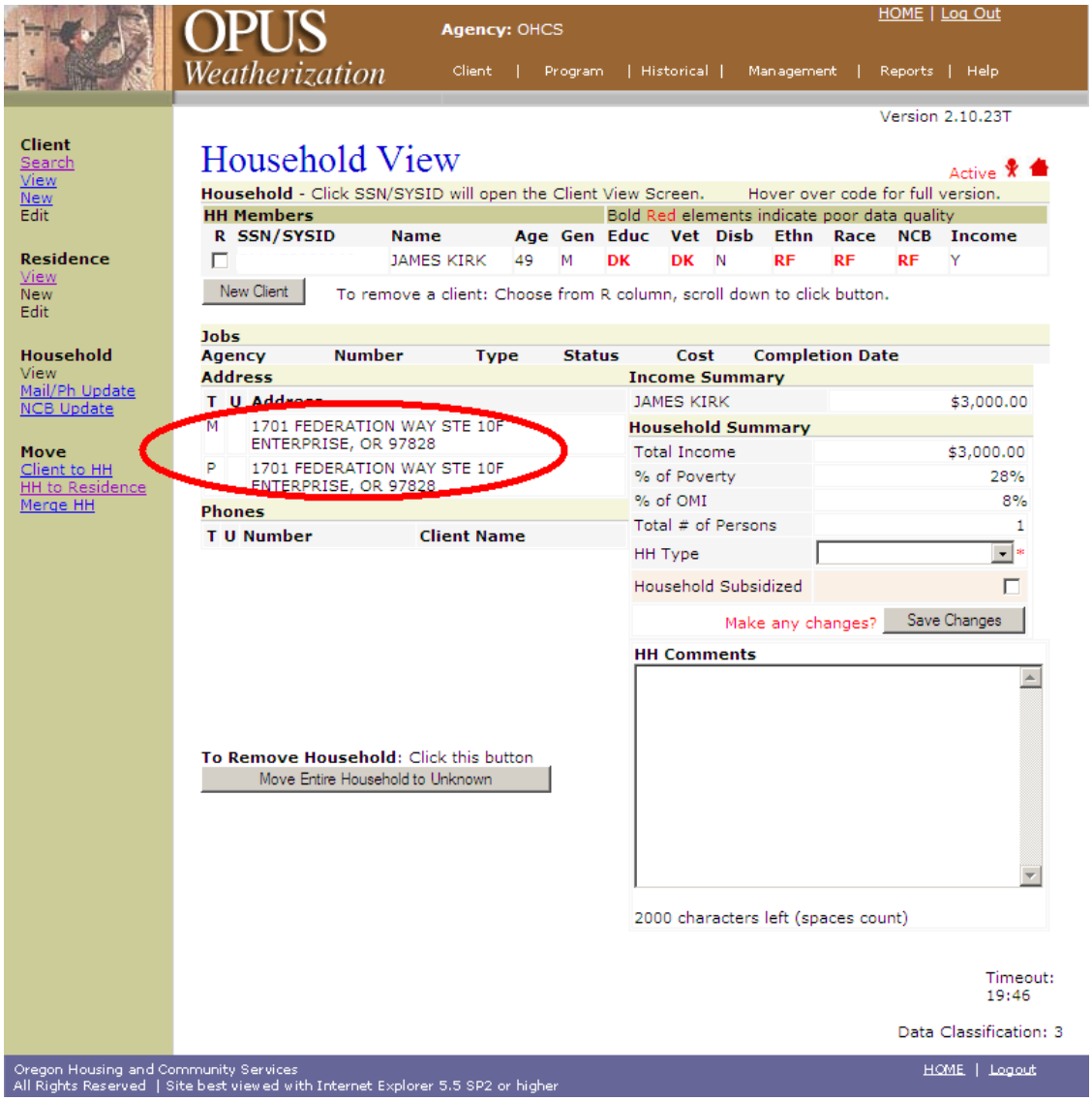

Figure 3-6: HH View with address

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

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

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

Figure 3-7: Client Search for residence

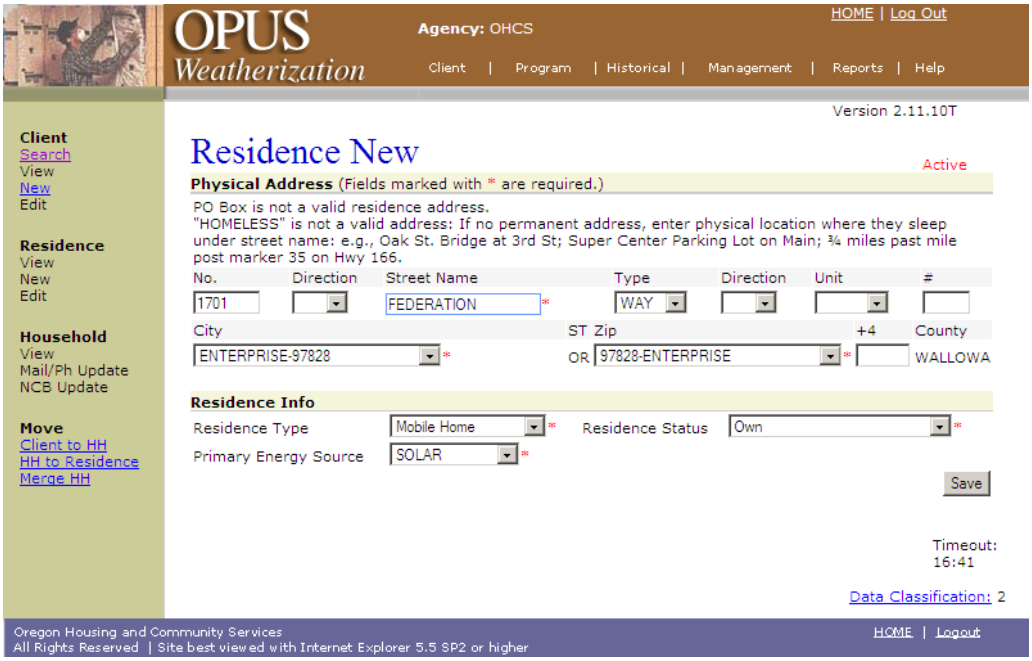

Figure 3-8: Residence New

Verifying Data on Views

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

Residence Edit

Setup:

On 'Client View' screen.

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

NOTE: PO Box is not a valid residence address. Also, "HOMELESS" is not a valid address. If you attempt to enter "Homeless" as a residence address you will receive an error notification *(reference figure 3-9C).* If there is no permanent address, enter physical location where they sleep under street name: e.g., Oak ST, Bridge at 3rd St; Super Center Parking Lot on Main; 3/4 miles past mile post marker 35 on Hwy 166.

Figure 3-9: in the Client View

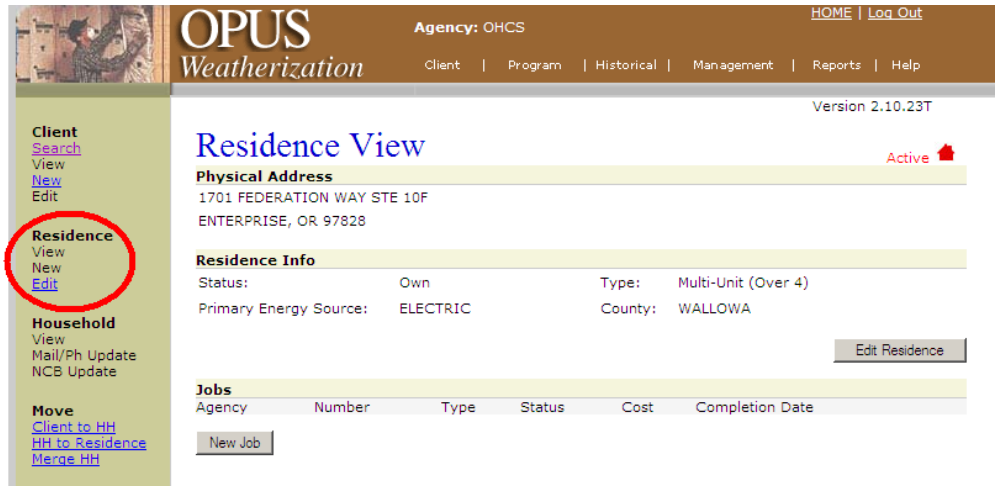

Figure 3-9A: Residence View, Edit

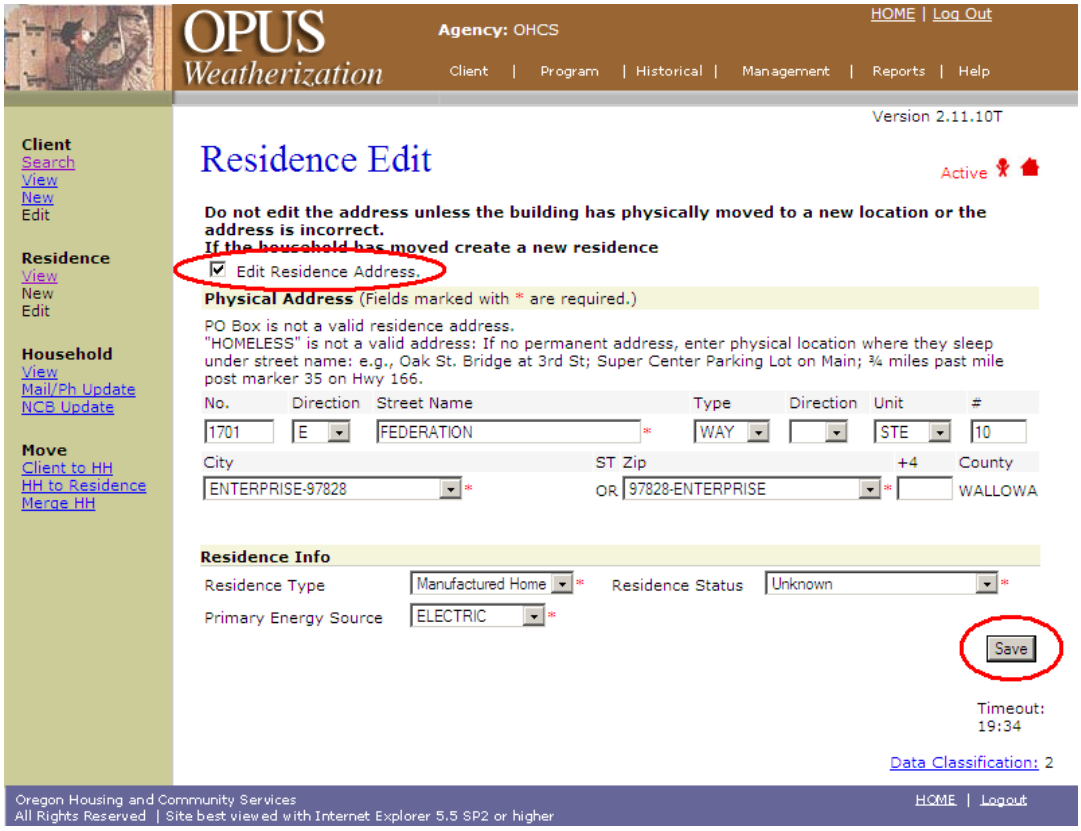

Figure 3-9B: Residence Edit screen

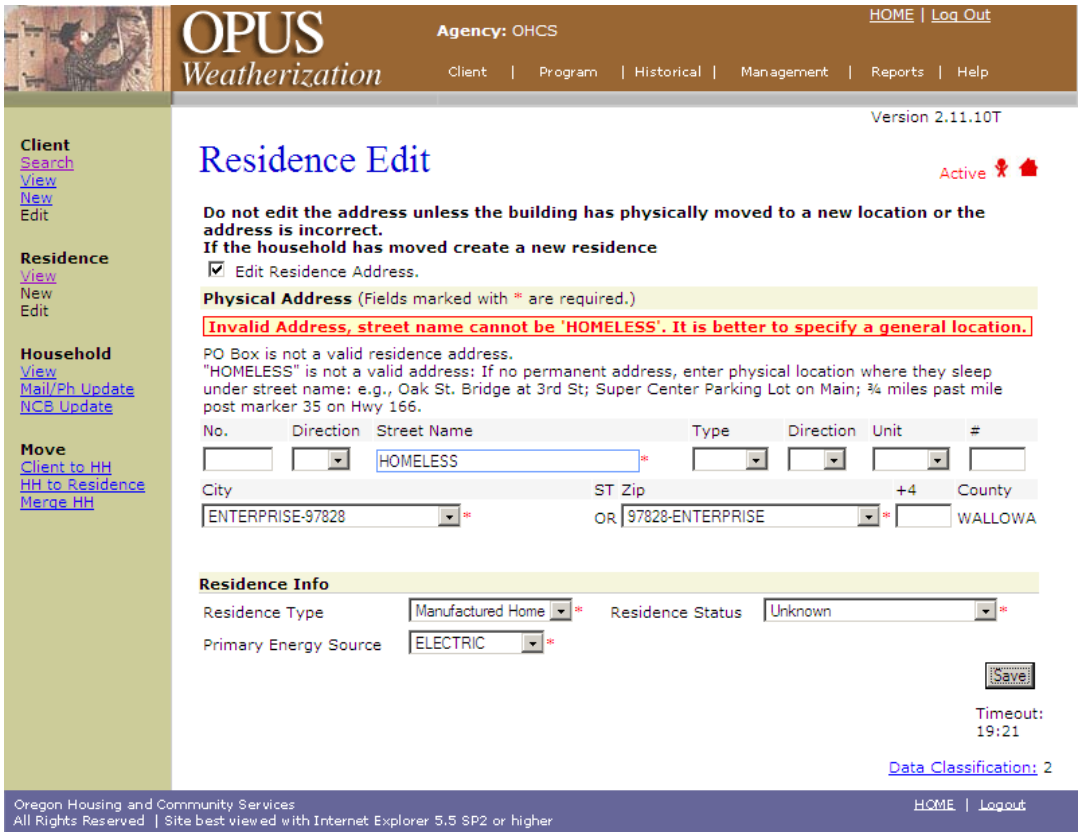

Figure 3-9C: Residence Edit – Homeless Error

If proceed you will receive a warning screen *(reference figure 3-9D)* I. At this point you are given one more chance. To proceed with the change and potential consequences select 'Yes". To abort/cancel select "No". After your selection you will return to the 'Residence View Screen'.

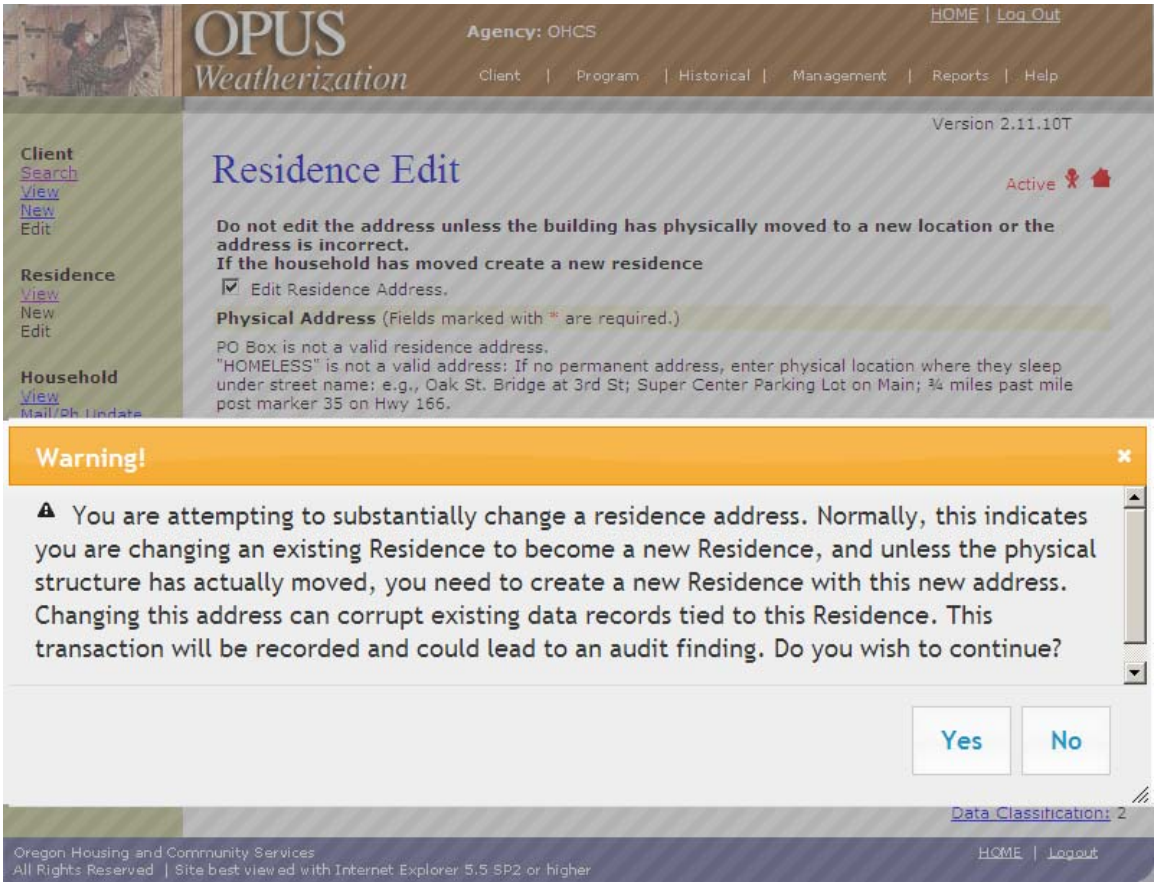

Figure 3-9D: Residence Edit – Warning

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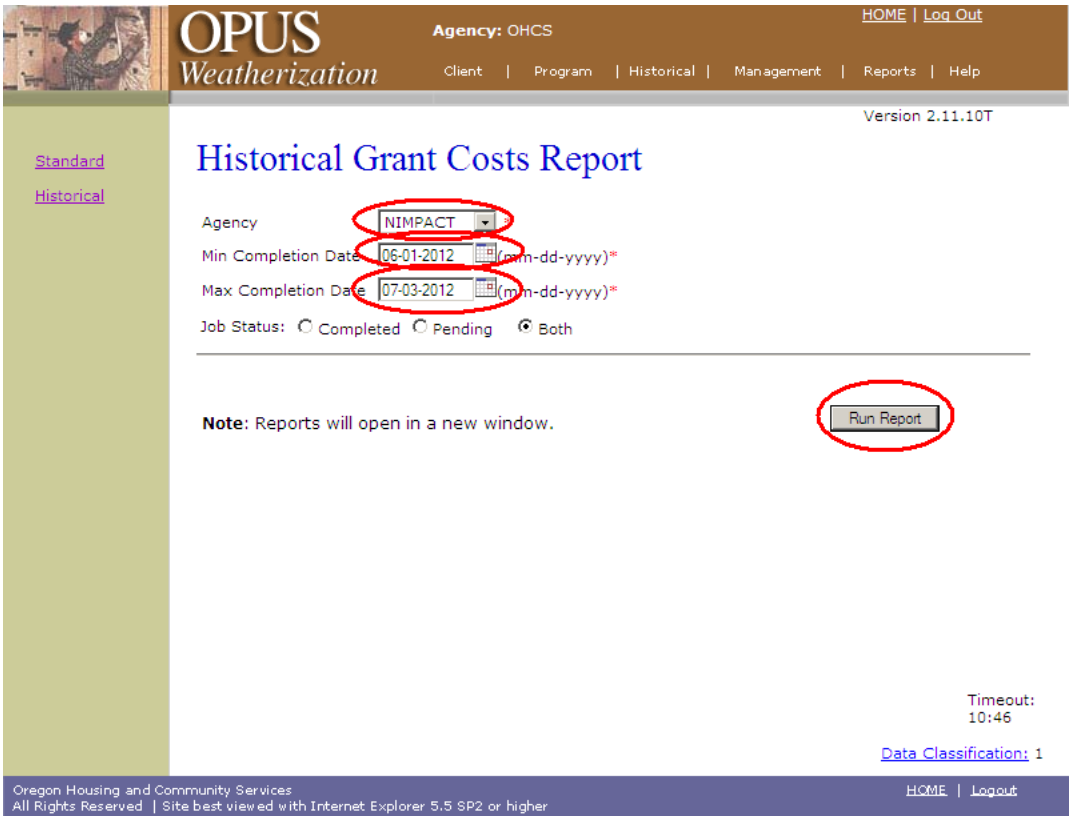

Figure 5-15A: Historical – Grants Cost Screen

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To, Job Status) and Click on the 'Run Report' button *(reference figure 5-15A).* The report will then display containing the requested information *(reference figure 5-15B).*

Historical Grant Costs for NIMPACT

From 6/1/12 To 7/3/12
Pending:Both

GRANT: WX DOE	Job #	Grant Cost	Agency
	336711	$ 180.00	NIMPACT
	669711	$ 771.29	NIMPACT
		$ 951.29	

GRANT: WX ECHO	Job #	Grant Cost	Agency
	005111	$ 9,469.83	NIMPACT
	336711	$ 604.20	NIMPACT
	838911	$ 11,540.11	NIMPACT
	876011	$ 4,178.83	NIMPACT
	973411	$ 1,580.30	NIMPACT
		$ 27,373.27	

GRANT: WX LIEAP 2011	Job #	Grant Cost	Agency
	204211	$ 811.60	NIMPACT
	669711	$ 5,409.52	NIMPACT
	876011	$ 75.00	NIMPACT
		$ 6,296.12	

GRANT: WX LIEAP 2012	Job #	Grant Cost	Agency
	204211	$ 10,191.30	NIMPACT
	336711	$ 7,700.79	NIMPACT
	669711	$ 5,669.01	NIMPACT
	876011	$ 1,246.00	NIMPACT
	973411	$ 1,927.68	NIMPACT
		$ 26,734.78	

Report Date: 4/3/13 Grant Costs 2.1 Page 1 Data Classification: 1

Figure 5-15B: Historical – Grants Cost