

OPUS



Weatherization Users Manual

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Presented by:

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Previous editions are obsolete and should no longer be utilized.

OPUS Wx User Manual

For OPUS System v3.0 and above

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Notices: OPUS Wx User Manual for OPUS System v3.0 and above.

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Help Us Improve this Manual

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

Oregon Housing and Community Services

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MANAGEMENT

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Section One

Basic Operations

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Internet Explorer Settings



Internet Explorer (IE) Settings

For use with Microsoft™ Internet Explorer version 8, 9 or 10 (Not in compatibility mode).
Do not utilize with any other browser as data corruption and unexpected errors may occur.

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:

For [Internet Explorer 8](#) Users go to Page 3

For [Internet Explorer 9](#) Users go to Page 10

For [Internet Explorer 10](#) Users go to Page 16

Internet Explorer 8 Setup Instructions

1. Open Internet Explorer (IE). Using the Main Tool Bar, Click Tools, point to Internet Options (*reference figure 1-1*).
2. In the Internet Options Panel (middle section of the window under ‘Temporary Internet Files’, click the Settings button (*reference figure 1-1A*).

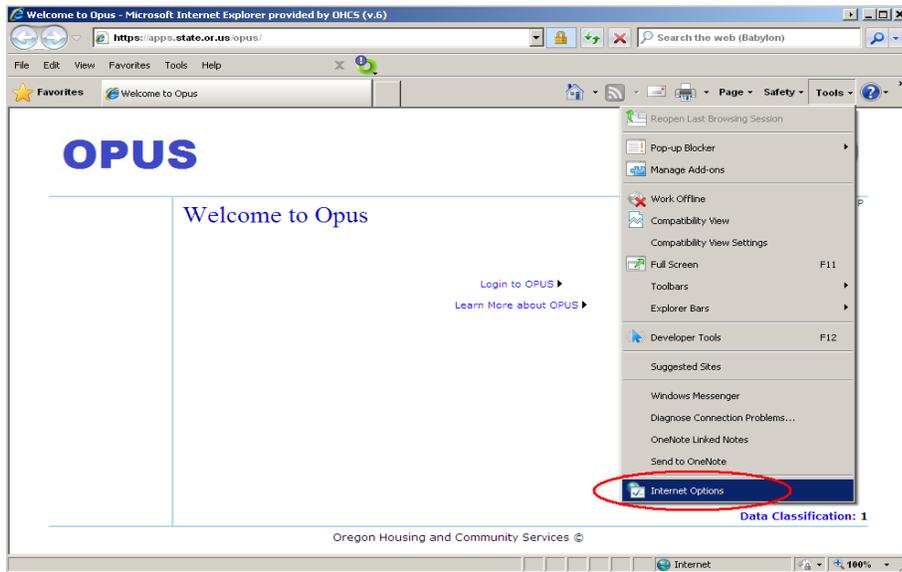


Figure 1-1: internet Options screen.

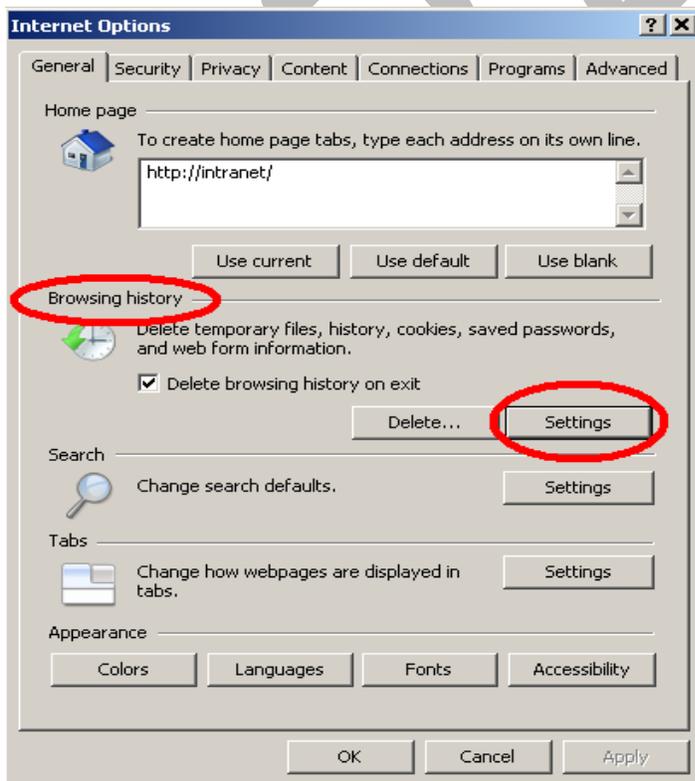
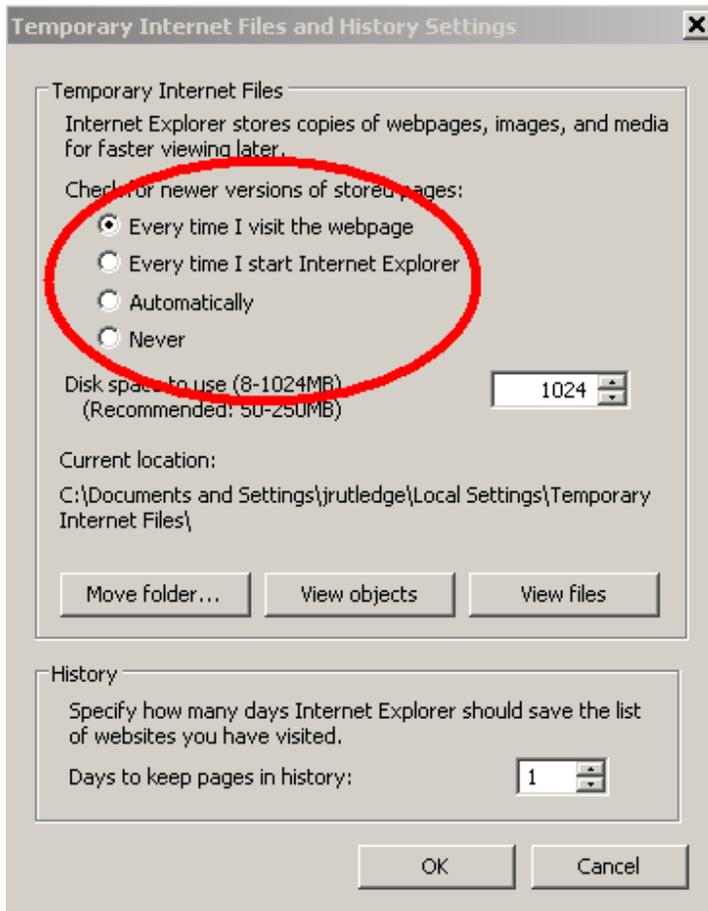


Figure 1-1A: Internet Options Advanced Settings

3. In 'Settings' screen, click the option "Every time I visit the webpage", then click "OK" button (reference figure 1-2).



Depending on the computer and IE version, the 'Temporary Internet Files and History Settings' view can vary in appearance and/or wording.

Regardless, the 'Check for newer versions of stored pages;' Must be:

"Every time I visit the webpage"

Figure 1-2: Settings Panel

4. Go to the "Advanced" tab (reference figure 1-3). Look for "Java (Sun) (reference figure 1-3). If Java (Sun) isn't there, double check to see if Microsoft VM Java is checked. If so, this is where the printing problem is. The reports won't print properly with VM Java. Symptoms: pages print landscape and portrait, the print could be cut off or print would be scrambled.

Java (Sun) Java 1.6.0_20 is the latest program. Reference the listed link to access the Java page for quick access: <http://java.com>

If possible, each agency's IS staff should be able to assist the user(s) in downloading on each computer unit (PC). When downloading there will be two security certificates. See example below. The first one is the standard agreement to using the software, check "always". The second security certificate is for the report plug-in, again check "always".

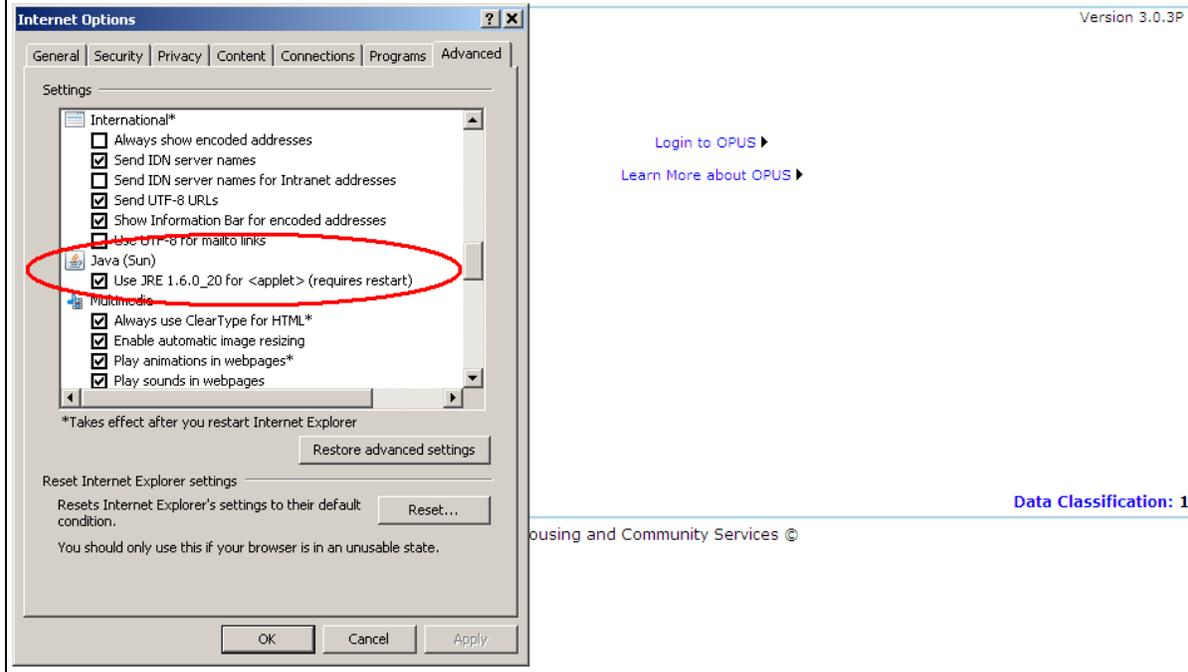


Figure 1-3: Settings Panel - Advanced

Java Security Update

Make sure all your browser windows are closed before proceeding.

1. Go to: Start button (usually located in the lower left corner of your monitor), go to 'setting', to 'control panel'.
2. If you are already in classic view skip this step. In the upper left corner of the screen click on 'Switch to Classic View'.

3. Double click on the Java Icon



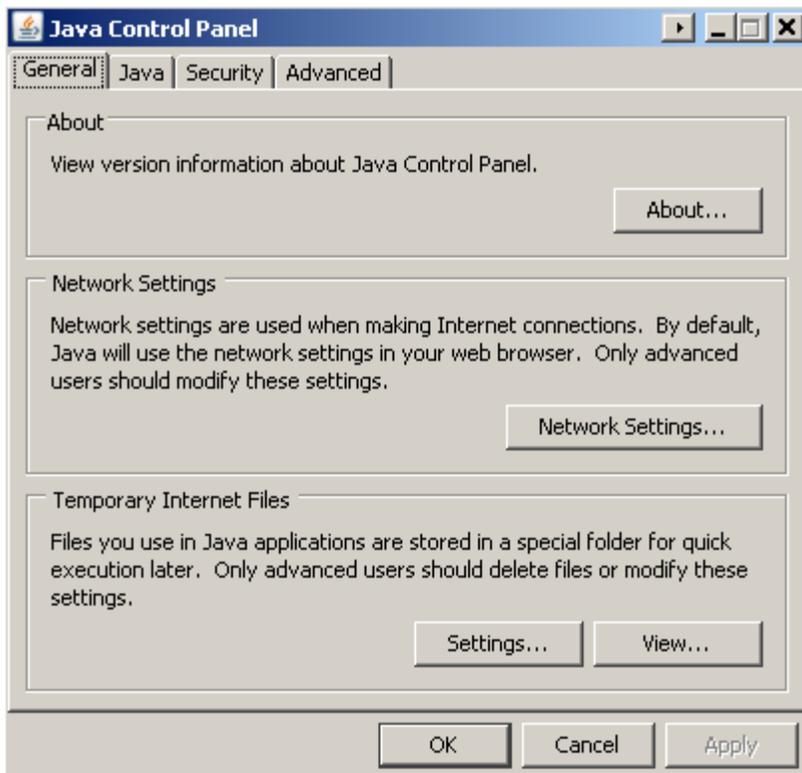


Figure 1-4A: Java Control Panel – General

4. Go to the “Advanced” tab (reference figure 1-4B). Click on the + sign in front of ‘Security’.

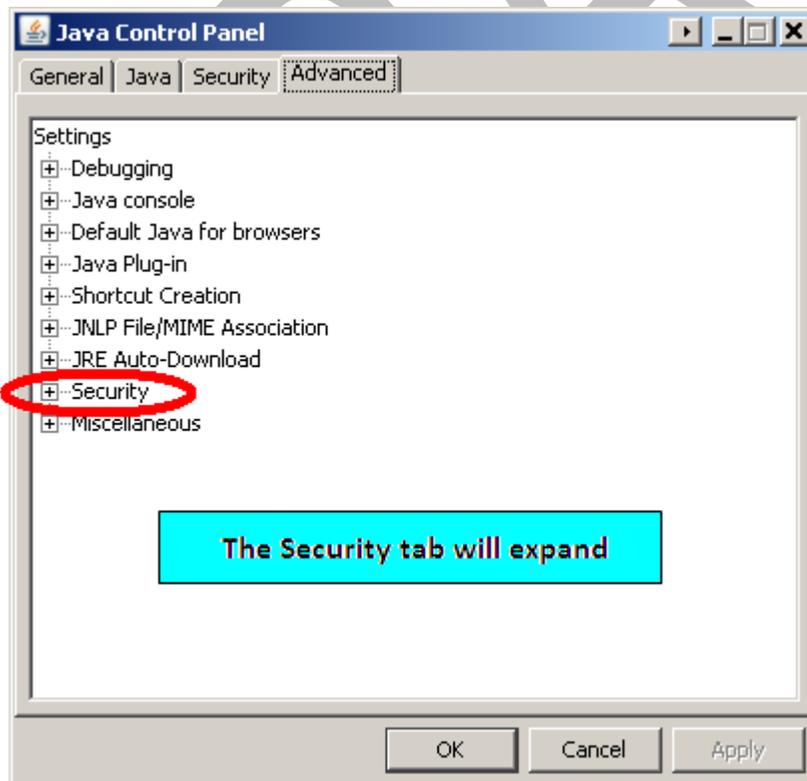


Figure 1-4B: Java Control Panel – Advanced

4. Click on the + sign in front of 'General' (reference figure 1-4C)

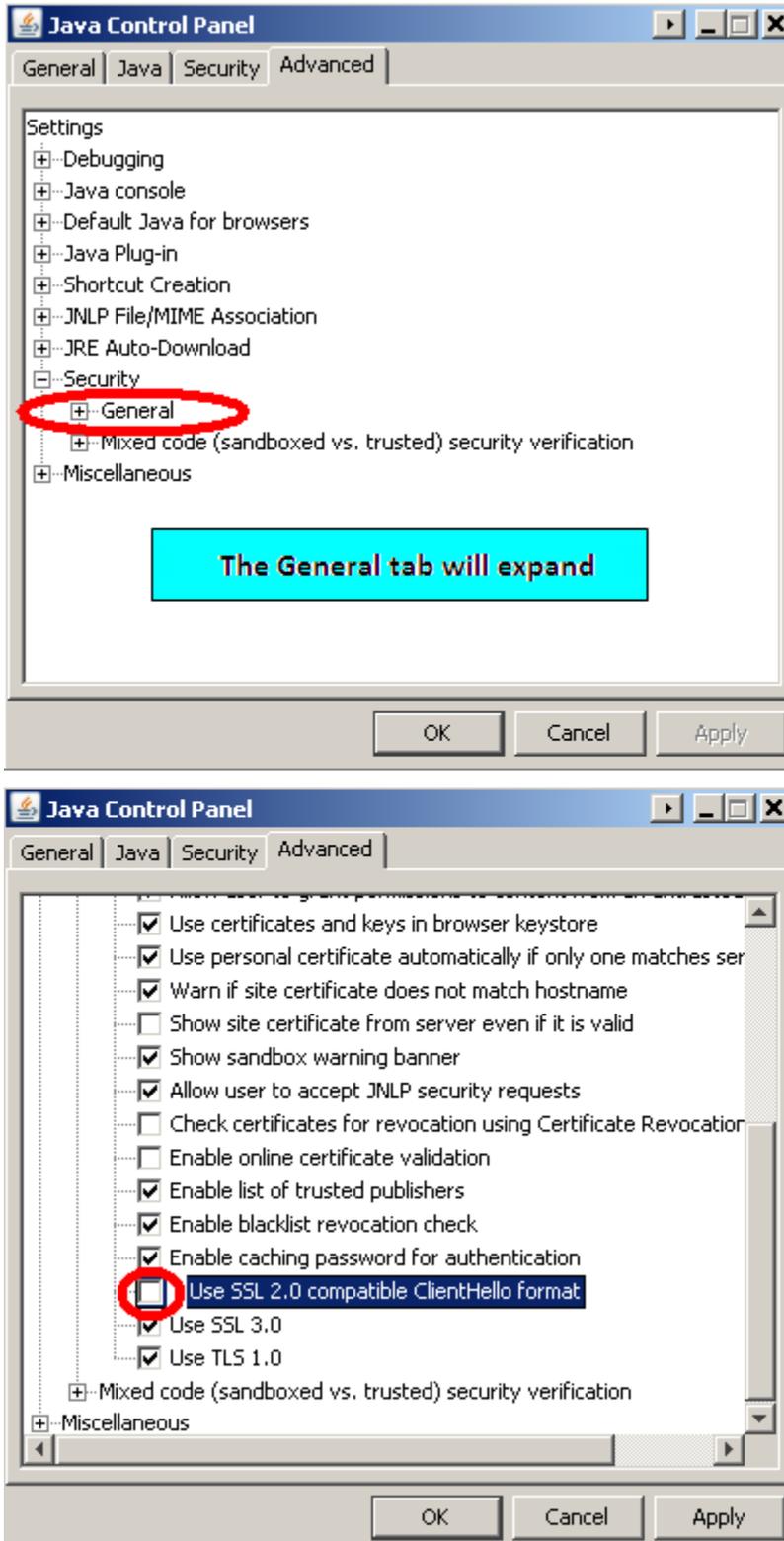


Figure 1-4C: Java Control Panel – Advanced – Security and General Tabs expanded

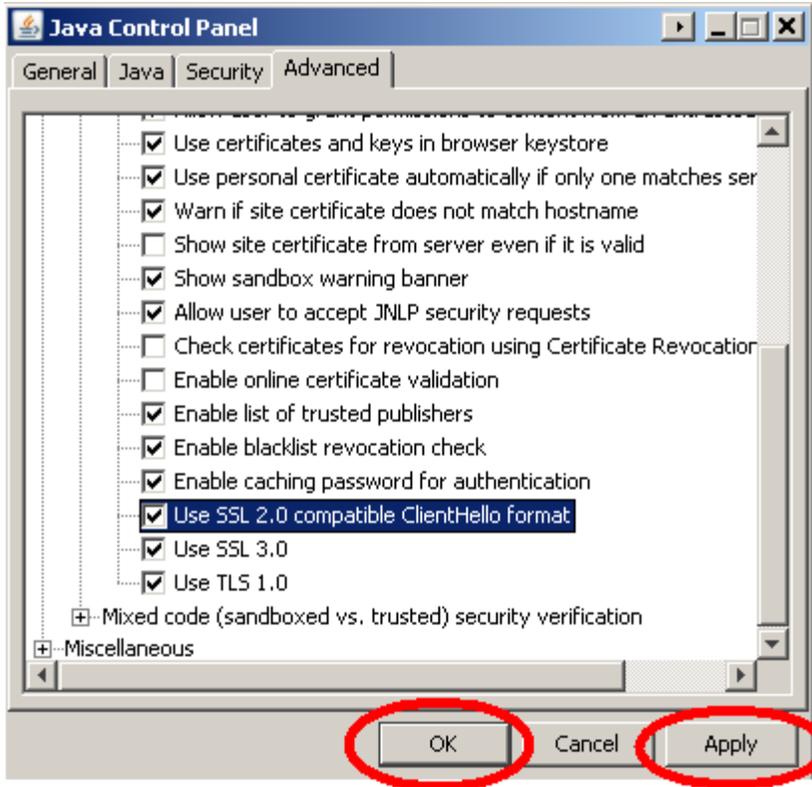


Figure 1-4D: Use SSL 2.0 compatible ClientHello format selection

5. Check the box highlighted above. Click on “Apply”, then “OK” (reference figure 1-4D)
6. Log into OPUS normally and run one of your reports. You should receive this pop up.



Figure 1-4E: Warning Security pop-up

7. Click on “Always trust content from this published.”



Figure 1-4F: Warning Security pop-up

8. Click on the “RUN” button and wait for the system to complete the process. Then you should be able to review your normal print window.
9. If you have any questions and if you have an IS person at your agency, ask for their assistance or contact

OPUS Helpdesk
opushelp@hcs.state.or.us
1-800-453-5511 Option #6

You are ready to login using OPUS.

[Goto Page 23 “Logging into OPUS”](#)

Internet Explorer 9 Setup Instructions

1. Open Internet Explorer (IE). Using the Main Tool Bar, Click Tools, point to Internet Options (reference figure 1-5).
2. In the Internet Options Panel (middle section of the window under ‘Temporary Internet Files’, click the Settings button (reference figure 1-5A).

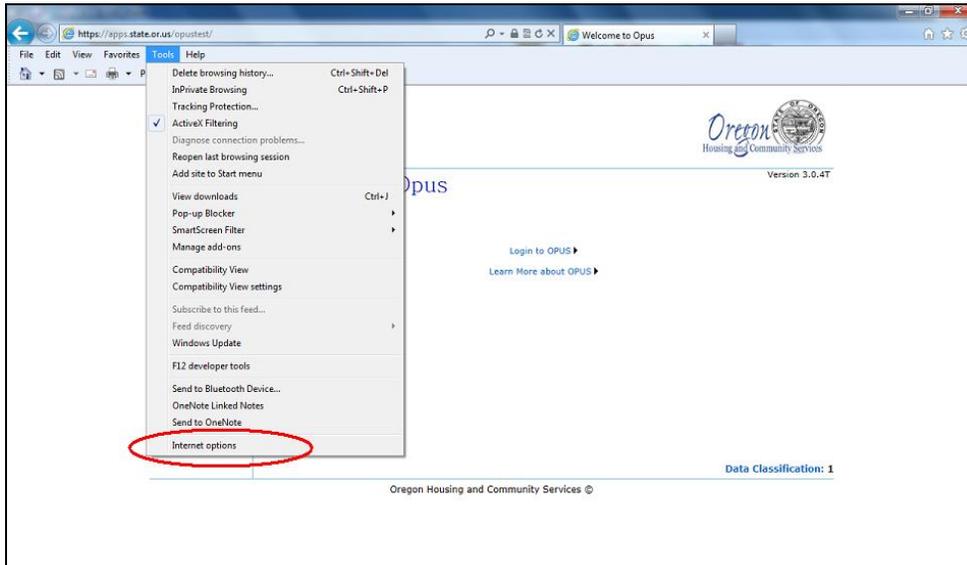


Figure 1-5: internet Options screen.

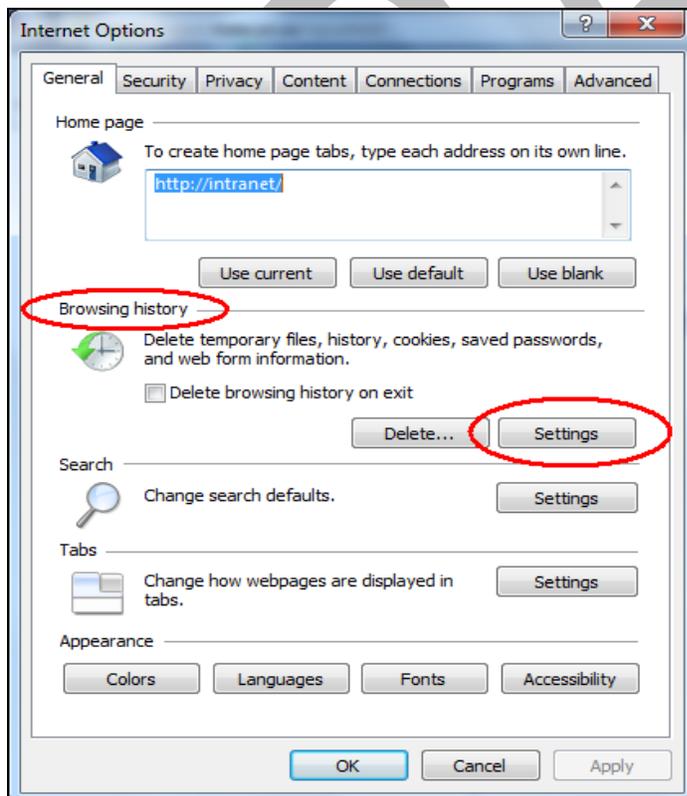
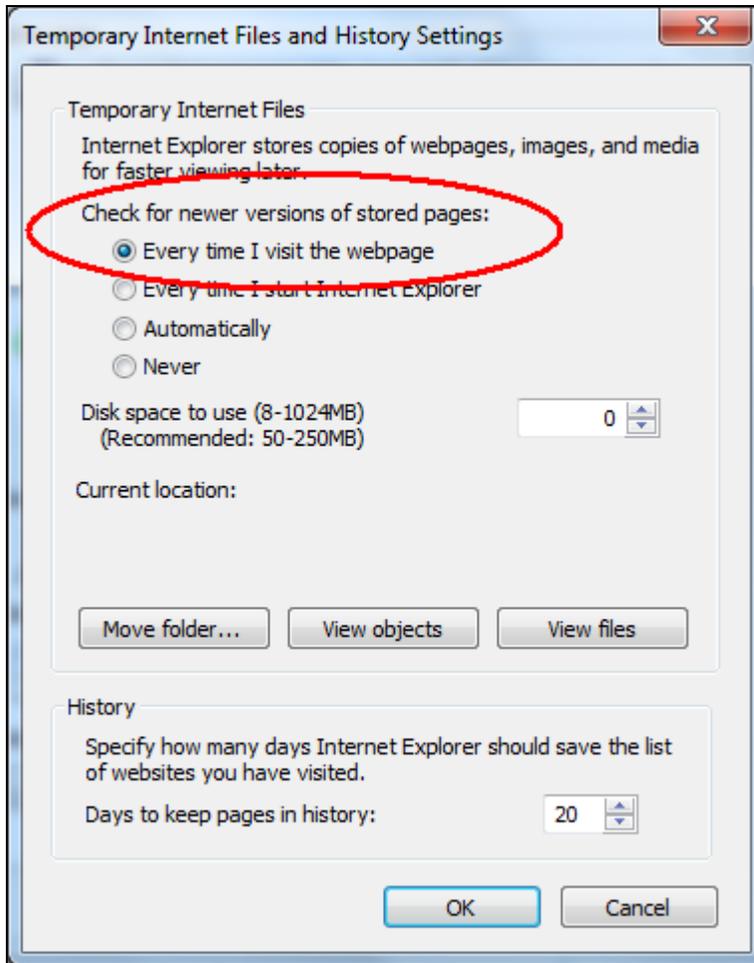


Figure 1-5A: Internet Options Advanced Settings

3. In 'Settings' screen, click the option "Every time I visit the webpage", then click "OK" button (reference figure 1-6).



Depending on the computer and IE version, the 'Temporary Internet Files and History Settings' view can vary in appearance and/or wording.

Regardless; the 'Check for newer versions of stored pages;' Must be:

"Every time I visit the webpage"

Figure 1-6: Settings Panel

Java Security Update

Make sure all your browser windows are closed before proceeding.

1. Go to: Windows Icon (usually located in the lower left corner of your monitor), double click on the icon  go to 'control panel'.

2. Double click on the Java Icon.



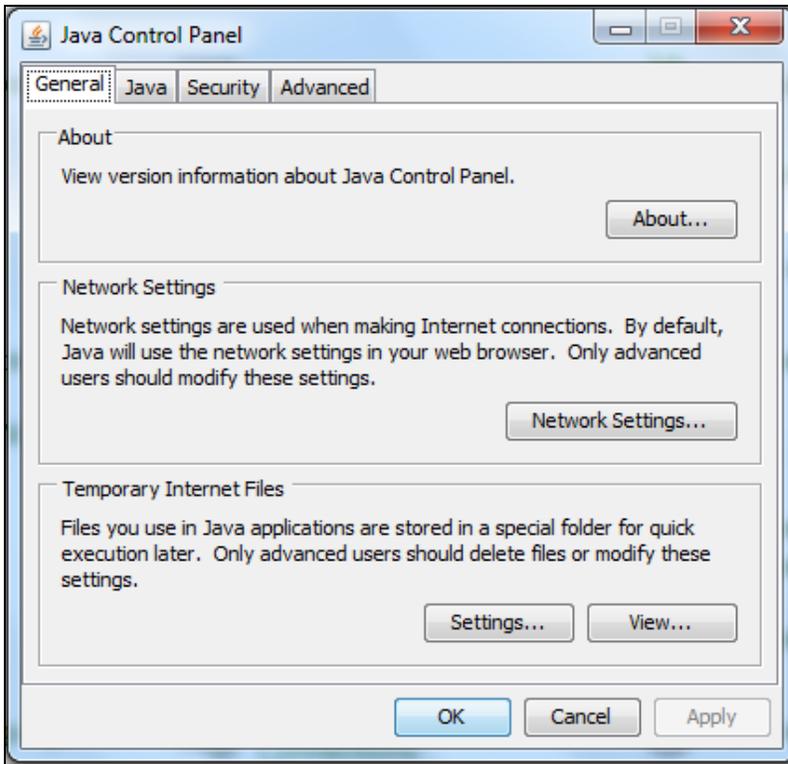


Figure 1-7A: Java Control Panel – General

4. Go to the “Advanced” tab (reference figure 1-7B). Click on the + sign in front of ‘Security’.

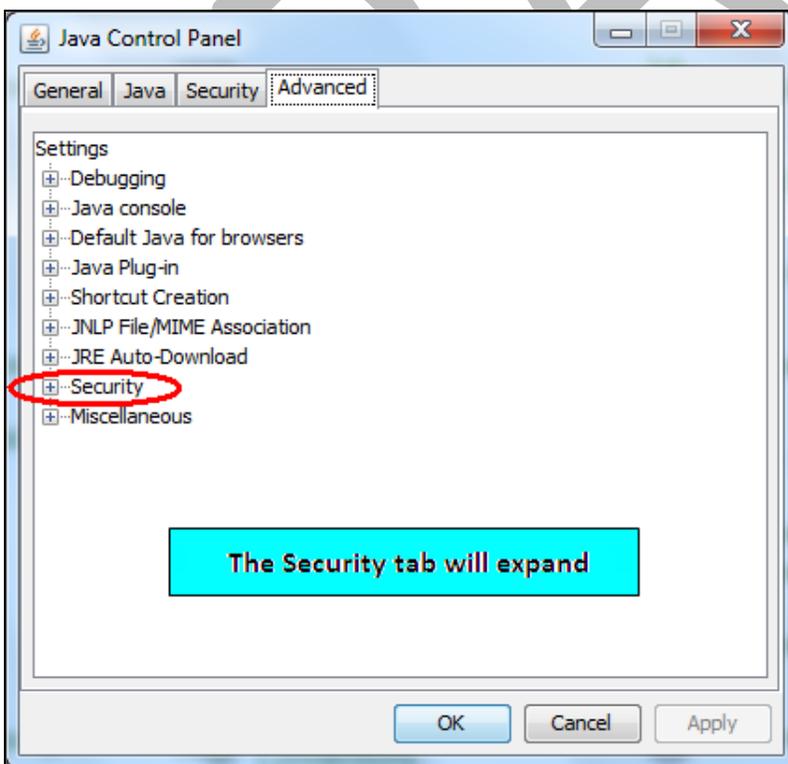


Figure 1-7B: Java Control Panel – Advanced

4. Click on the + sign in front of 'General' (reference figure 1-7C)

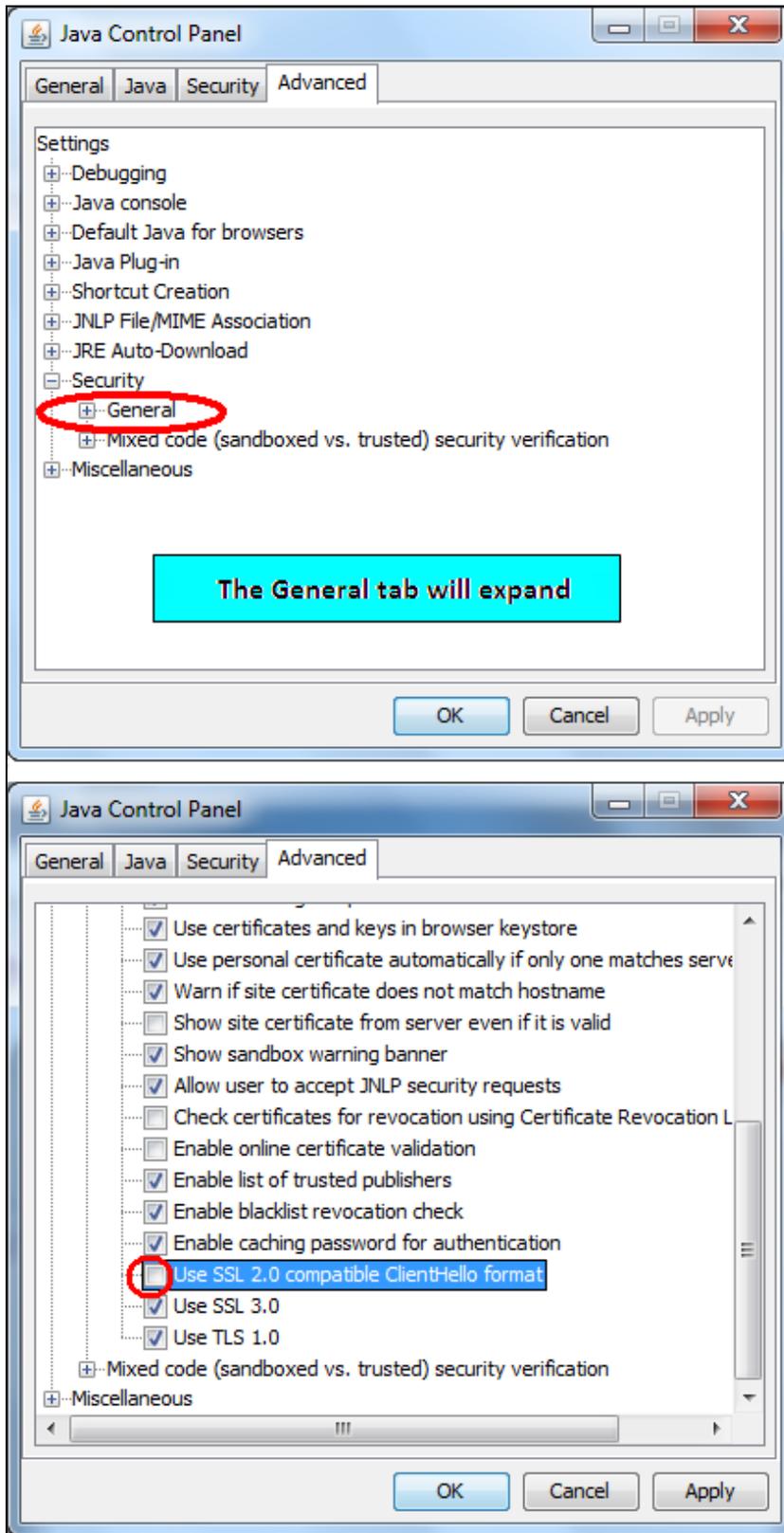


Figure 1-7C: Java Control Panel – Advanced – Security and General Tabs expanded

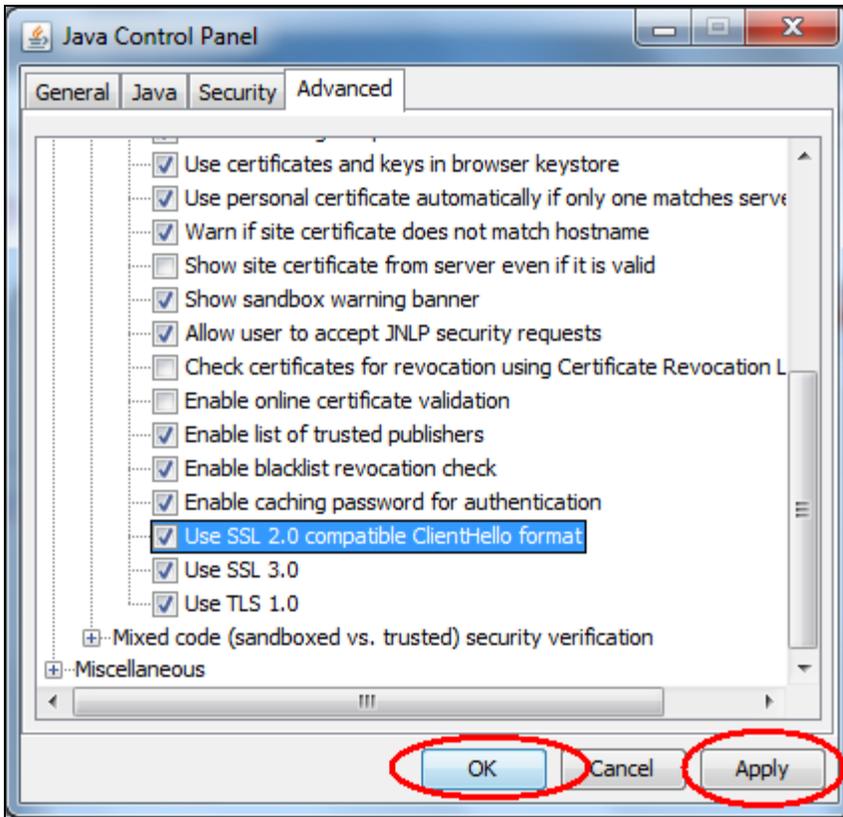


Figure 1-7D: Use SSL 2.0 compatible ClientHello format selection

5. Check the box highlighted above. Click on "Apply", then "OK" (reference figure 1-7D)
6. Log into OPUS normally and run one of your reports. You should receive this pop up.

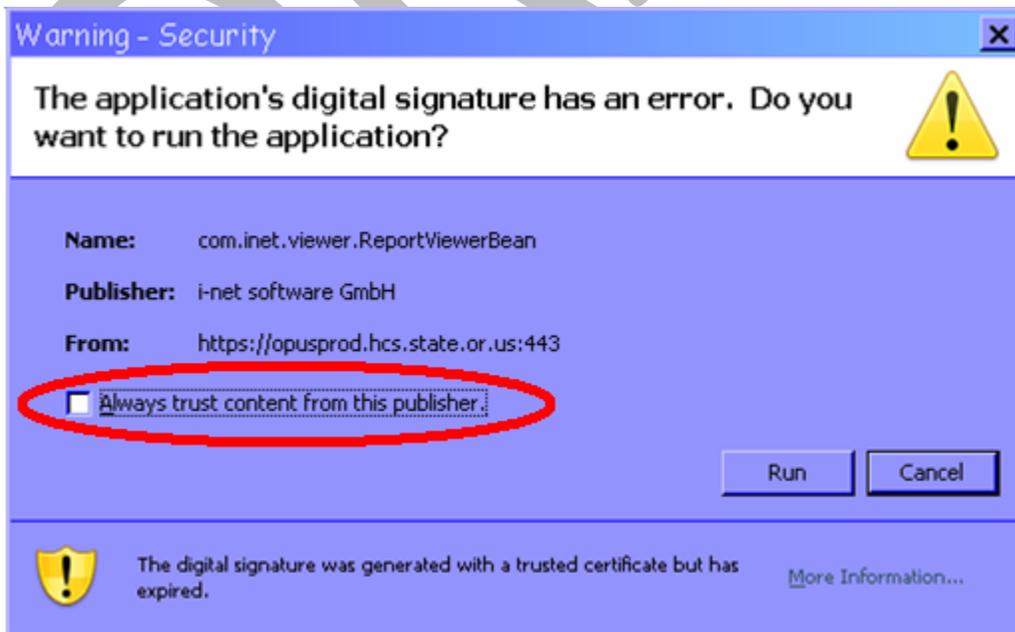


Figure 1-7E: Warning Security pop-up

7. Click on “Always trust content from this published.”



Figure 1-7F: Warning Security pop-up

8. Click on the “RUN” button and wait for the system to complete the process. Then you should be able to review your normal print window.
9. If you have any questions and if you have an IS person at your agency, ask for their assistance or contact

OPUS Helpdesk
opushelp@hcs.state.or.us
1-800-453-5511 Option #6

You are ready to login using OPUS.

[Goto Page 23 “Logging into OPUS”](#)

Internet Explorer 10 Setup Instructions

1. Open Internet Explorer (IE). Using the Main Tool Bar, Click Tools, point to Internet Options (reference figure 1-8).
2. In the Internet Options Panel (middle section of the window under ‘Temporary Internet Files’, click the Settings button (reference figure 1-8A).

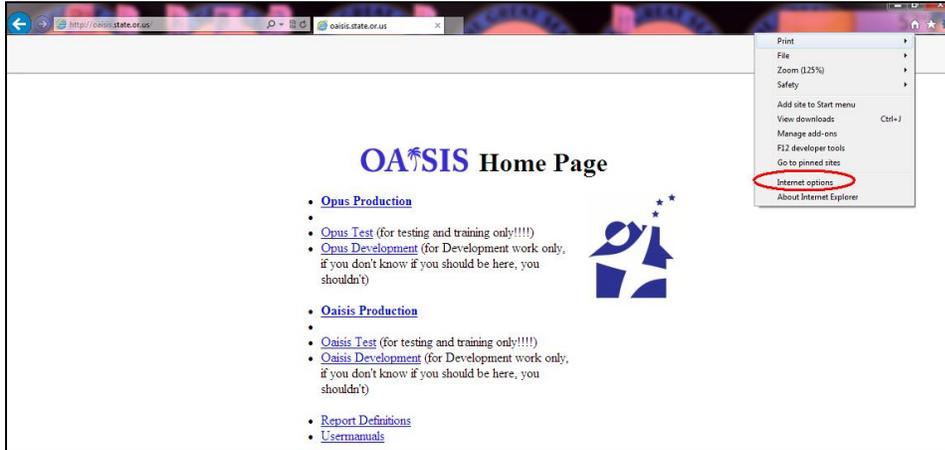


Figure 1-8: internet Options screen.

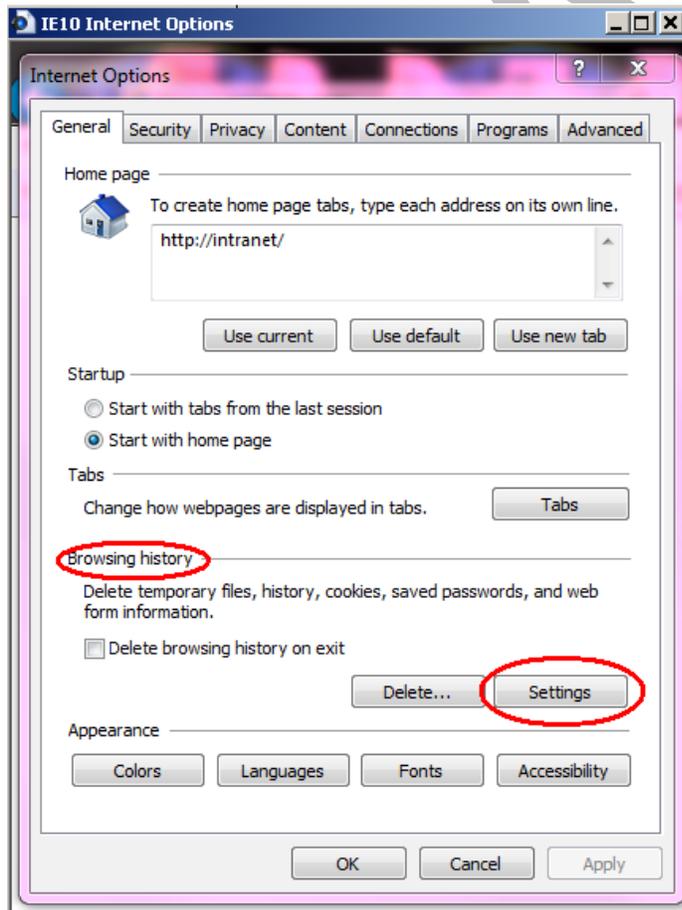
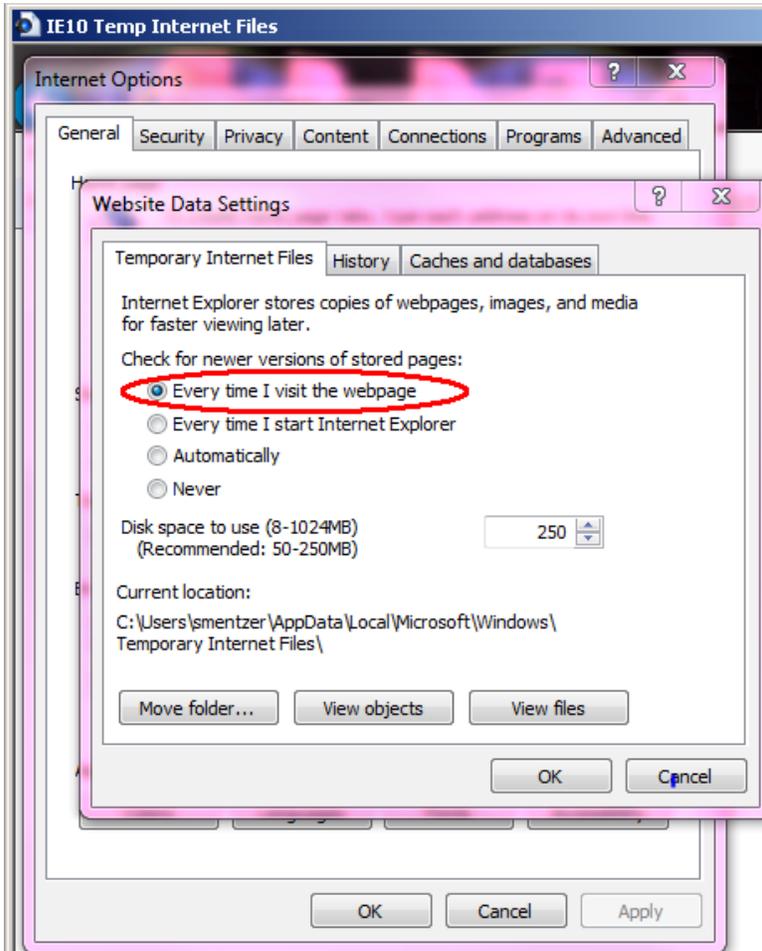


Figure 1-8A: Internet Options Advanced Settings

3. In 'Settings' screen, click the option "Every Visit to the Page", then click "OK" button (reference figure 1-9).



Depending on the computer and IE version, the 'Temporary Internet Files and History Settings' view can vary in appearance and/or wording.

Regardless; the 'Check for newer versions of stored pages;' Must be:

"Every time I visit the webpage"

Figure 1-9: Settings Panel

Java Security Update

Make sure all your browser windows are closed before proceeding.



1. Located the Windows Icon (usually located in the lower left corner of your monitor), double click on the icon.
2. The Start Menu will appear. On the right hand column double click the "Control Panel" button (reference figure 1-10).

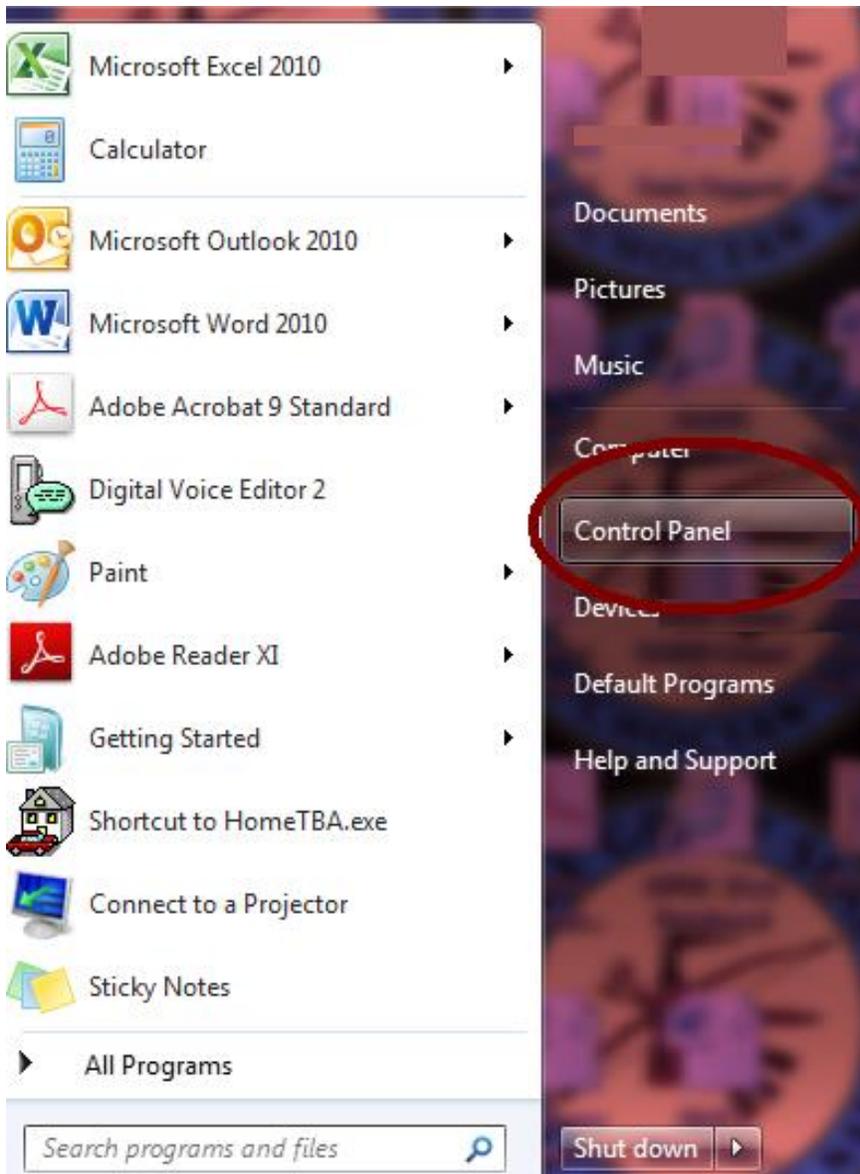


Figure 1-10: Start Menu – Control Panel

3. Double click on the Java Icon.  Java
The Java Control Panel will appear (*reference figure 1-11A*).

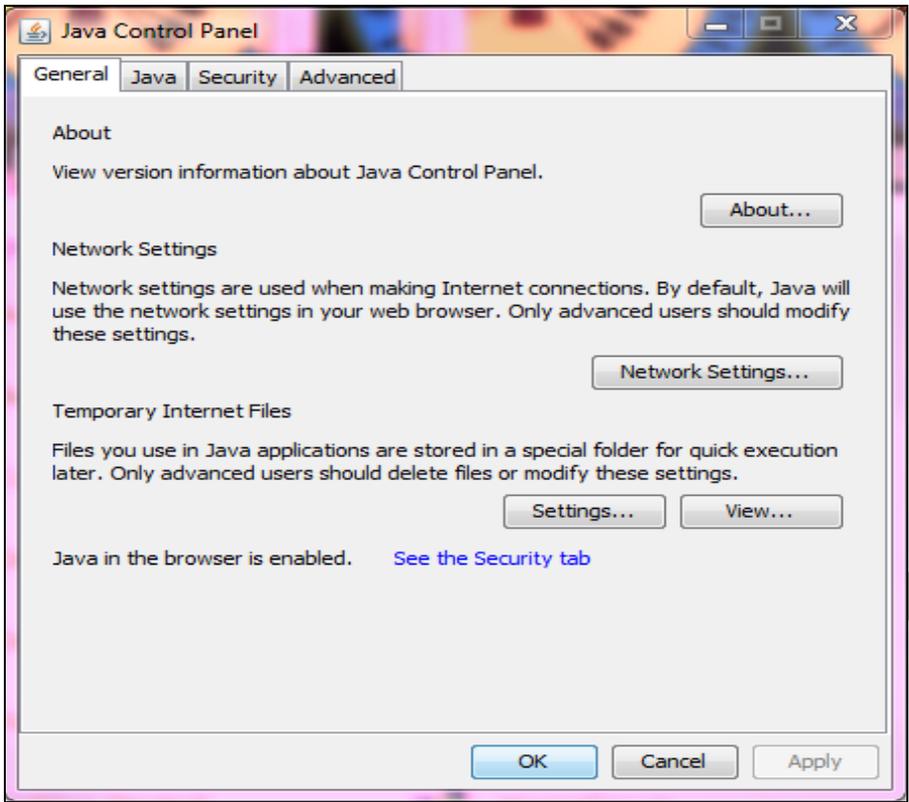


Figure 1-11A: Java Control Panel – General

4. Go to the “Advanced” tab (reference figure 1-11B). Click on the + sign in front of ‘Security’.

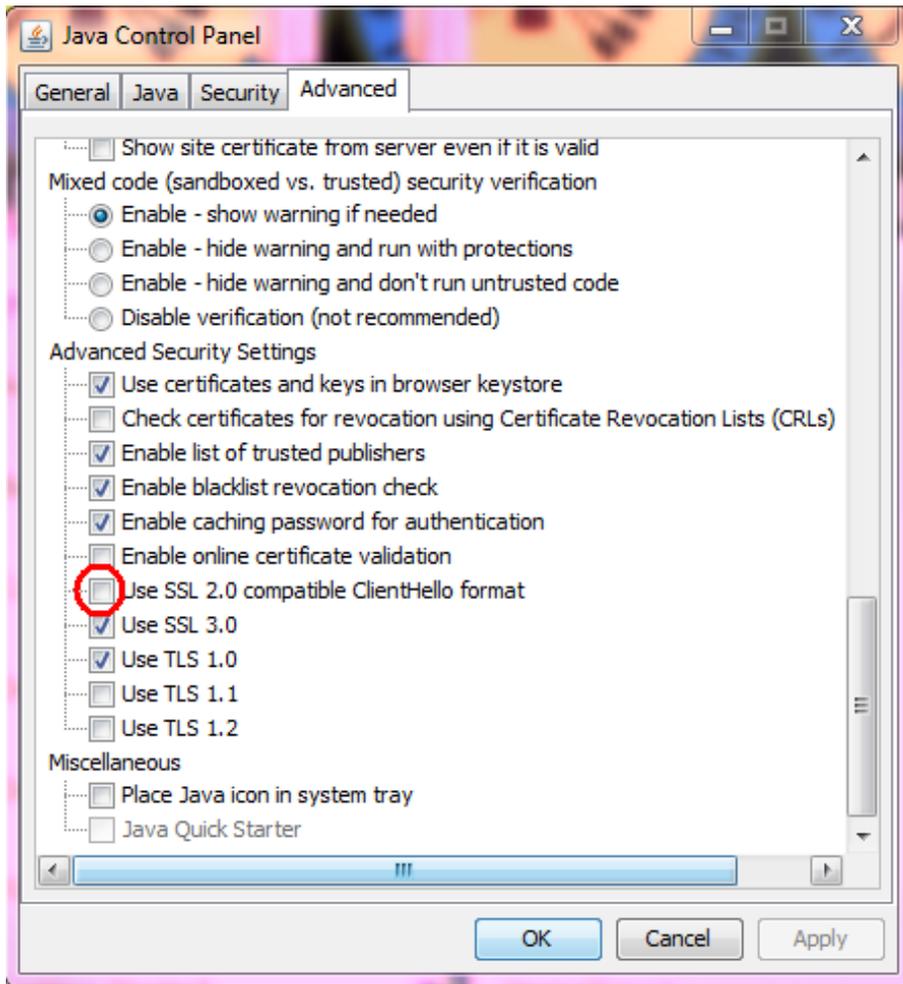


Figure 1-11B: Java Control Panel – Advanced

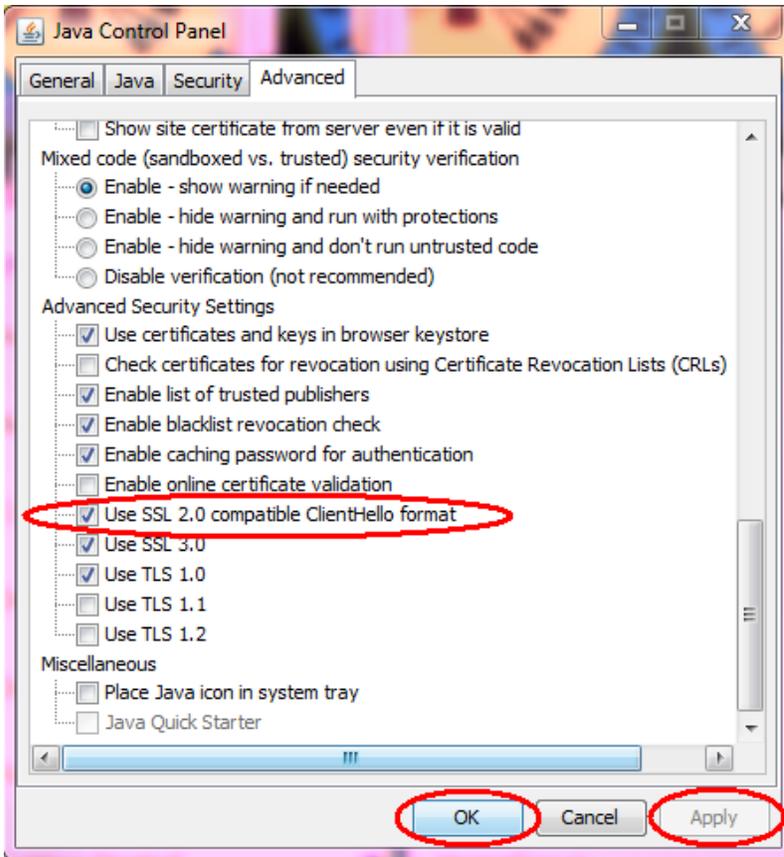


Figure 1-11C: Use SSL 2.0 compatible ClientHello format selection

5. Check the box highlighted above. Click on “Apply”, then “OK” (reference figure 1-11C)
6. Log into OPUS normally and run one of your reports. You should receive this pop up.

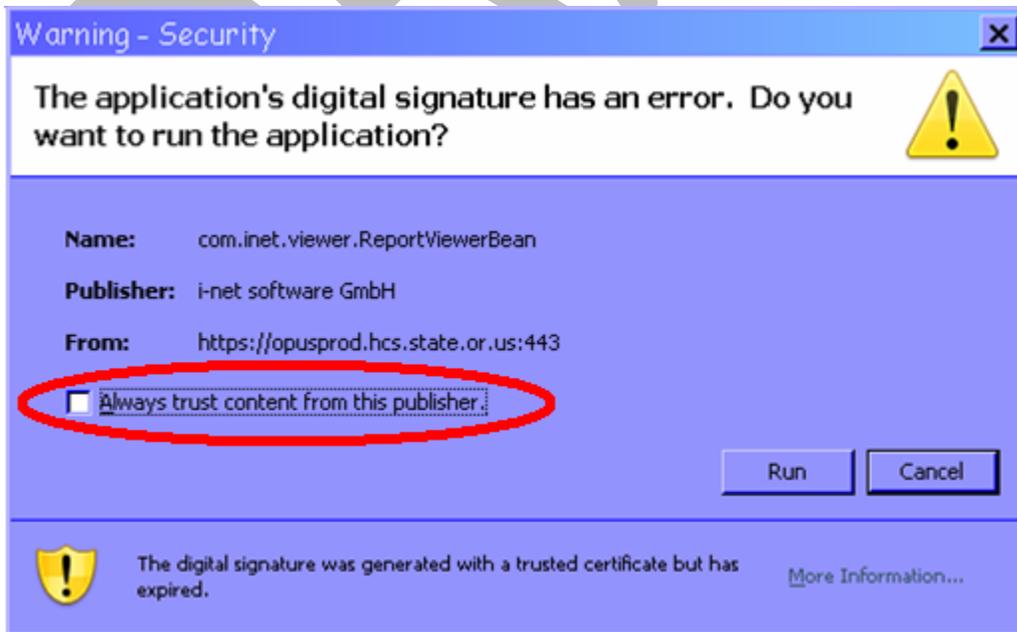


Figure 1-12A: Warning Security pop-up

7. Click on “Always trust content from this publisher.”



Figure 1-12B: Warning Security pop-up

8. Click on the “RUN” button and wait for the system to complete the process. Then you should be able to review your normal print window.
9. If you have any questions and if you have an IS person at your agency, ask for their assistance or contact

OPUS Helpdesk
opushelp@hcs.state.or.us
1-800-453-5511 Option #6

You are ready to login using OPUS.

Logging into OPUS

Setup:

1. Start Internet Explorer (IE)
2. Type the address: <https://apps.state.or.us/opus/>
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 screen, click the 'Login to OPUS' link (*reference figure 1-11A*).

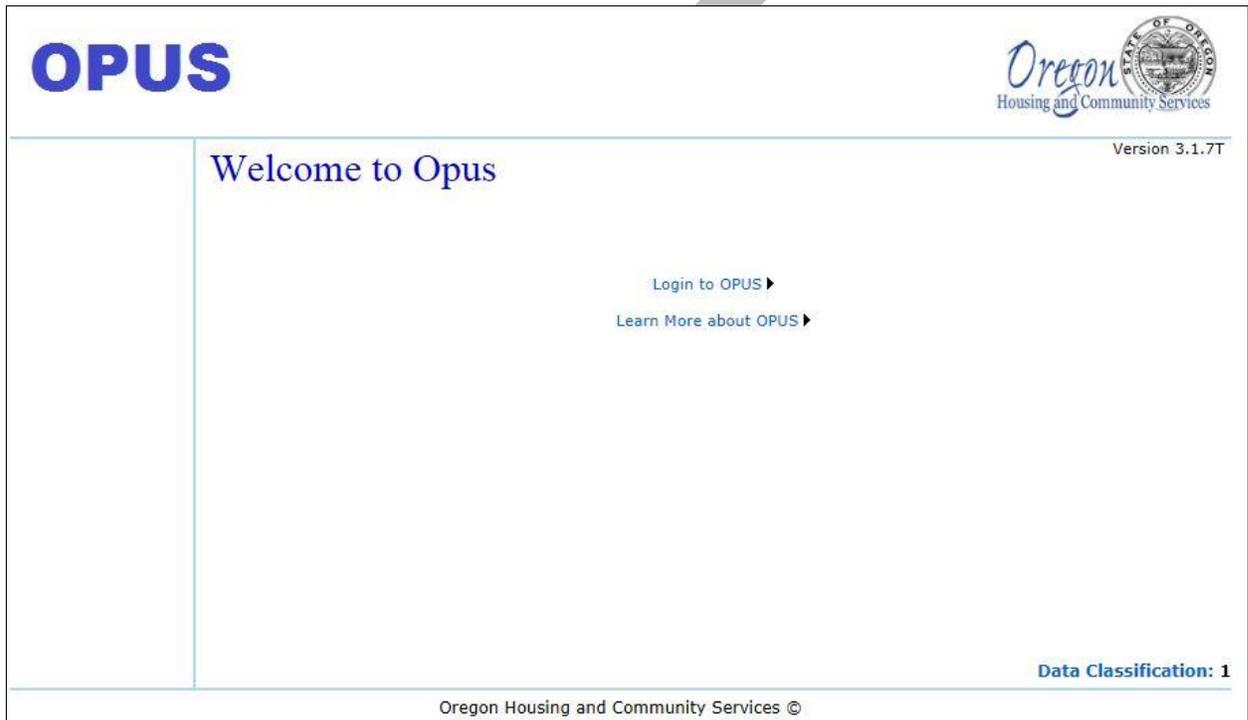


Figure 1-13A: OPUS Main Page

5. On the 'Login' screen, type the 'User Name' and the password (*reference figure 1-13B*). For new users, a temporary password automatically sent via email from the OPUS System when a new user is created or password is reset (NOTE: Temporary passwords are valid for 24 hours from issue date/time). The user will required to change it on the next screen. The 'Password' *is* case sensitive.



Figure 1-13B: Login screen

6. Click the 'Login' button.

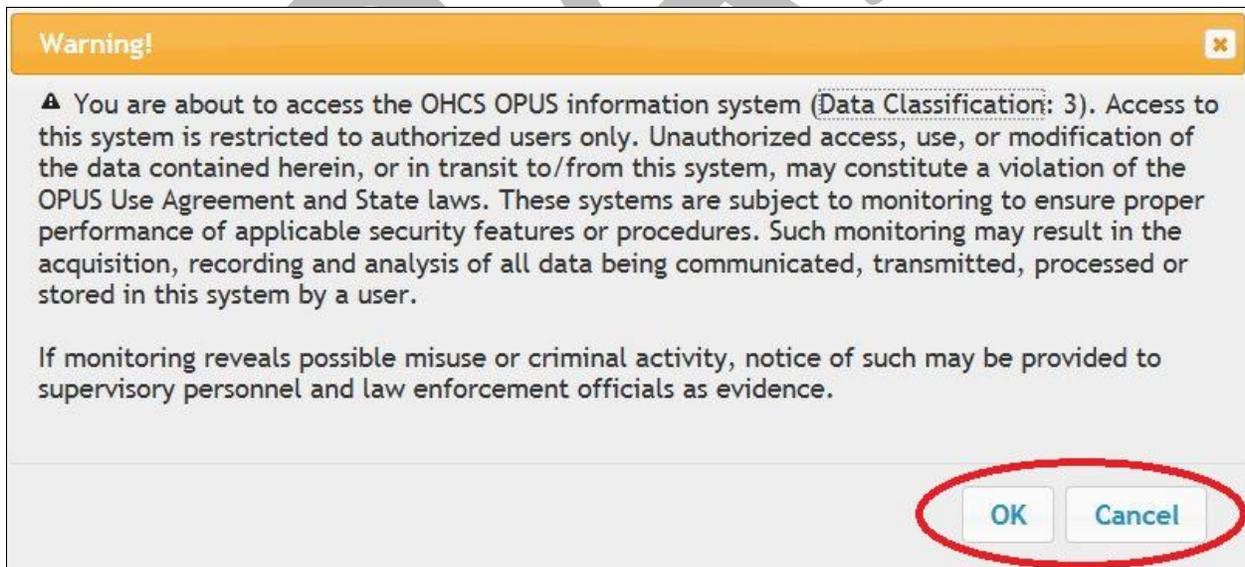


Figure 1-14: Data Classification Warning Screen

7. The Data Classification 'Warning' screen will appear. Click 'OK' to proceed or 'CANCEL' to return to the 'Login' screen (*reference figure 1-14*)
8. The 'Change Password' screen will appear. For the 'Old Password'; type the temporary (default) password again (*reference Figure 1-15*).

Figure 1-15: Password change screen.

9. Type a new password (this will be the permanent one to use on a regular basis unless there is a password reset). 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 in the middle somewhere (characters such as #, *, -, @, \$). A password cannot begin with a number.
10. In the next box, re-type your new password, to confirm.
11. Click the ‘Change’ button. The ‘Agency & Module Select’ screen will appear. Some OPUS users have more than one module to work in, if so, the user has the opportunity to select the module they are approved to work in. Users with one module won’t need to do anything except click ‘submit’. If a user has multiple modules, use the dropdown button in ‘OPUS Module’ to select the required module then click ‘Submit’ (reference Figure 1-16).

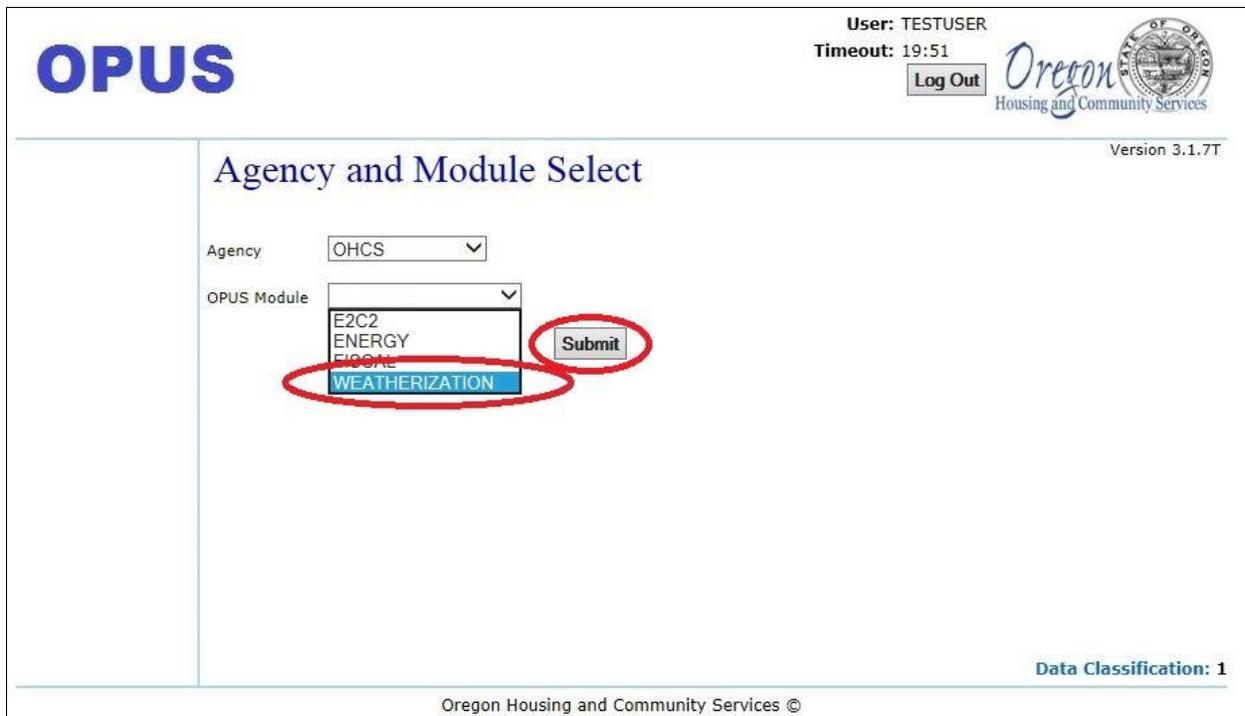


Figure 1-16: Agency & Module Select screen.

12. After clicking on the 'Submit' button, 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. Users will be alerted to notices of upcoming system-upgrades, program updates, and OPUS helpdesk procedures.

To initiate a client search, click the 'Search Client' link at the left or use the Main Menu, scroll over 'Client' and click on the 'Search' dropdown (reference Figure 1-17A). To initiate a job search use the Main Menu, scroll over 'Program' and click on the 'Job Search' dropdown (reference Figure 1-17B).

Agency: OHCS User: TESTUSER Timeout: 17:49 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Search Client Search

Version 3.1.7T

Change Password? Edit Your User Account

Message of the Day

WELCOME! To start OPUS - Click Search Client

System Issue? Contact us @ opushelp@oregon.gov, or by phone 1-800-453-5511, option #6.

Daily Notices	Program Notices	OPUS Help
<p>01-22-2014 - The system was updated to Version 3.0.5 on 01/21/2014. Please report ALL issues to the HelpDesk.</p> <p>10-23-2013 - The system was updated to Version 3.0.4 on 10/22/2013. Please report ALL issues to the HelpDesk.</p> <p>10-16-2013 - The system was updated to Version 3.0.3 on 10/15/2013. Please report ALL issues to the HelpDesk.</p>	<p>10-03-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p> <p>09-27-2013 - ALL IE 10 Update, Sprint #15, & 2014 Payment year changes will be deployed to Opus Production on this Weekend, Sept 28 & 29.</p> <p>09-17-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p>	<p>E-mail: opushelp@oregon.gov</p> <p>10-03-2013 - To expedite Opus HelpDesk assistance, please include contact information when emailing.</p> <p>01-14-2010 - Never send full SSNs to Helpdesk! E-mail is not secure. You put your clients at risk if you do. Only name and last 4 of SSN is needed.</p> <p>06-19-2009 - Password Resets OPUS Helpdesk does not issue passwords. When a new user account is created or an existing account is reset, a</p>

Figure 1-17A: Main Menu - Links for Search Client.

Agency: OHCS User: TESTUSER Timeout: 16:37 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Search Client Job Search

Version 3.1.7T

Change Password? Edit Your User Account

Message of the Day

WELCOME! To start OPUS - Click Search Client

System Issue? Contact us @ opushelp@oregon.gov, or by phone 1-800-453-5511, option #6.

Daily Notices	Program Notices	OPUS Help
<p>01-22-2014 - The system was updated to Version 3.0.5 on 01/21/2014. Please report ALL issues to the HelpDesk.</p> <p>10-23-2013 - The system was updated to Version 3.0.4 on 10/22/2013. Please report ALL issues to the HelpDesk.</p> <p>10-16-2013 - The system was updated to Version 3.0.3 on 10/15/2013. Please report ALL issues to the HelpDesk.</p>	<p>10-03-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p> <p>09-27-2013 - ALL IE 10 Update, Sprint #15, & 2014 Payment year changes will be deployed to Opus Production on this Weekend, Sept 28 & 29.</p> <p>09-17-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p>	<p>E-mail: opushelp@oregon.gov</p> <p>10-03-2013 - To expedite Opus HelpDesk assistance, please include contact information when emailing.</p> <p>01-14-2010 - Never send full SSNs to Helpdesk! E-mail is not secure. You put your clients at risk if you do. Only name and last 4 of SSN is needed.</p> <p>06-19-2009 - Password Resets OPUS Helpdesk does not issue passwords. When a new user account is created or an existing account is reset, a</p>

Figure 1-17B: Main Menu - Links for Program Job Search.

HOME and the Log Out Screen

The 'HOME' and 'Log Out' links are located on the Main Menu (*reference Figure 1-17C*). The 'HOME' link goes to the "Message of the Day" screen.

The screenshot shows the OPUS Weatherization user interface. At the top left is the OPUS Weatherization logo. The top right shows the user information: Agency: OHCS, User: TESTUSER, Timeout: 16:37, and a circled 'Log Out' button. Below the logo is a navigation menu with links for Client, Program, Hist, Management, Reports, and Help. The main content area is titled 'Message of the Day' and contains a welcome message, a system issue notice, and a table of notices. The table has three columns: Daily Notices, Program Notices, and OPUS Help. The bottom right corner of the page shows 'Data Classification: 1' and 'Oregon Housing and Community Services ©'.

Daily Notices	Program Notices	OPUS Help
<p>01-22-2014 - The system was updated to Version 3.0.5 on 01/21/2014. Please report ALL issues to the HelpDesk.</p> <p>10-23-2013 - The system was updated to Version 3.0.4 on 10/22/2013. Please report ALL issues to the HelpDesk.</p> <p>10-16-2013 - The system was updated to Version 3.0.3 on 10/15/2013. Please report ALL issues to the HelpDesk.</p>	<p>10-03-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p> <p>09-27-2013 - ALL IE 10 Update, Sprint #15, & 2014 Payment year changes will be deployed to Opus Production on this Weekend, Sept 28 & 29.</p> <p>09-17-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p> <p>03-31-2013 - HMIS All HMIS users current have View Access only while data is being pulled.</p> <p>03-19-2013 - Internet Explorer 10 Incompatibility Microsoft made significant changes in IE10 that causes Opus not to work correctly. While we are modifying every page to make them compatible (a substantial amount of work), please use IE9 or an earlier version.</p>	<p>E-mail: opushelp@oregon.gov</p> <p>10-03-2013 - To expedite Opus HelpDesk assistance, please include contact information when emailing.</p> <p>01-14-2010 - Never send full SSNs to Helpdesk! E-mail is not secure. You put your clients at risk if you do. Only name and last 4 of SSN is needed.</p> <p>06-19-2009 - Password Resets OPUS Helpdesk does not issue passwords. When a new user account is created or an existing account is reset, a temporary password is automatically generated & sent by the system to the users email account. OPUS Helpdesk has no control over this. If you need to have your password reset, please contact your agencies OPUS System Administrator.</p> <p>08-01-2007 - HMIS Help Manual updated.</p> <p>01-05-2007 - If your Main Nav Drop-Down is not working, please e-mail the Opus helpdesk. This is a problem with Internet Explorer and we will help you fix it.</p>

Figure 1-17C: Main Menu - Links for HOME and Log Out screen.

To end a session, click the 'Log Out' link. The 'Log Off' screen will appear. To continue logging off, click the "Yes" button. To cancel from logging off, and return to the last screen visited, click the "No, Go Back" button (*reference Figure 1-18*).

The 'Log Off' screen has a five minute timer before logging the user totally out. All other OPUS screens have a 20 minute timer (reference Figure 1-19A). . If there isn't activity in a screen, the system will go to 'log out' (reference Figure 1-18).



Figure 1-18: [Log Off screen](#)

DRAFT

Types of Screens and Buttons

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

Search Screen

The 'Search' screen is used to search for existing database records.

Wild cards: OPUS supports the use of two types of wild cards on search screens. (% many characters, _ single character). All search screens automatically adds a % wild card in the background [unseen] to the end of the search parameter.

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 displays existing database records so a user can edit regions/fields requiring updating and to be saved.

New Screen

A 'New' screen creates new records, 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 (*reference Figure 1-19A*). If a screen is inactive for more than 20 minutes, the 'Log Off' screen will appear. The 'Log Off' screen has a five (5) minute timer. You will need to click either "No" or "Yes" within 5 minutes. If a response is not completed within five minutes, the session will end and the user will be logged off. To continue using OPUS, the user must re-log into OPUS. This process is a security measure programmed into the system to protect client and agency information.

Data Classification

Information, like other assets, must be properly managed from its creation to disposal. As with other assets, not all information has the same value or importance and therefore information requires different levels of protection. Information asset classification and data management are critical to ensure that the information assets have a level of protection corresponding to the sensitivity and value of the information asset. Descriptions of data classification levels can be found via the following link:

<https://apps.state.or.us/oaisdocs/usermanual/DataClassificationGuidelines.pdf>



Figure 1-19A: Screen Timer



Figure 1-19B: Data Classification

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.

Screen Navigation

Main Menu, Left Navigation Bar (Left Nav Bar), and Drop-Down Menus
OPUS screens have two navigational sections: Main Menu and Left Navigation Bar.

Version Designation.

At the top of the page on the right hand side just below the Oregon Housing and Community Services logo you will see the version of OPUS you are currently logged into. There are currently (2) two different OPUS databases available to users. Which are designated by the trailing suffix's of "P" = Production (i.e. Version 3.0.0P) and "T" Training (i.e. Version 3.0.0T). These databases operate independently of each other. The production database is the real world database. You will spend most of your time in this area. The training database is for training of new users and testing of new functions.

Main Menu

The 'Main Menu' is the horizontal section located on the top area of the screen (*reference Figure 1-20*). The active 'Agency' is displayed in the 'Main Menu'. The main menu provides top level drop-down menus. Drop-down menus appear under: Client, Program, Fiscal, Management, Reports and Help

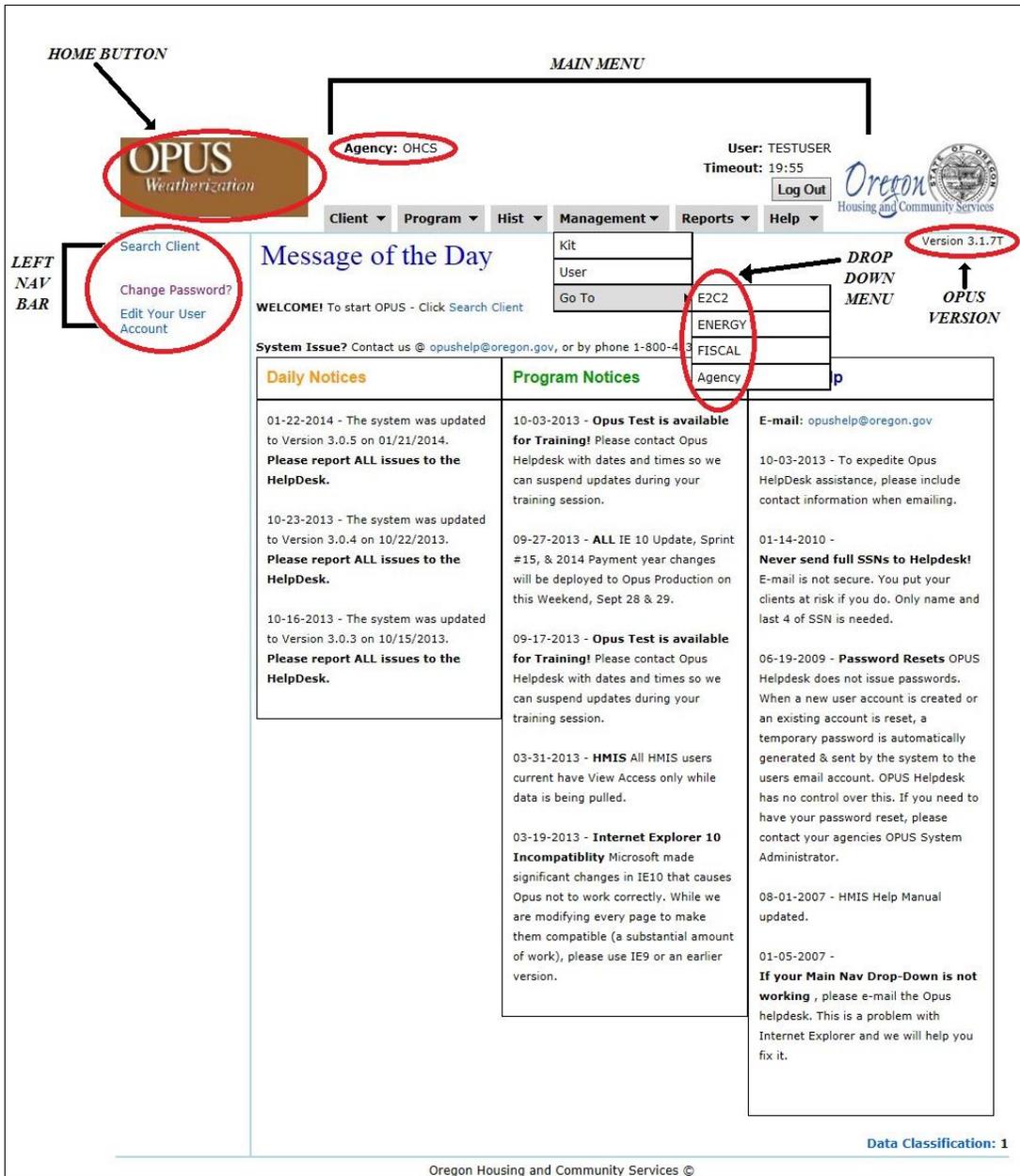


Figure 1-20: Main Menu and Left Nav Bar

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 ‘Management’ menu has a drop-down menu with a “Go To” item menu, 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 (*reference Figure 1-20*). 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.

WX Residence Client Flowchart
Thursday, August 02, 2012

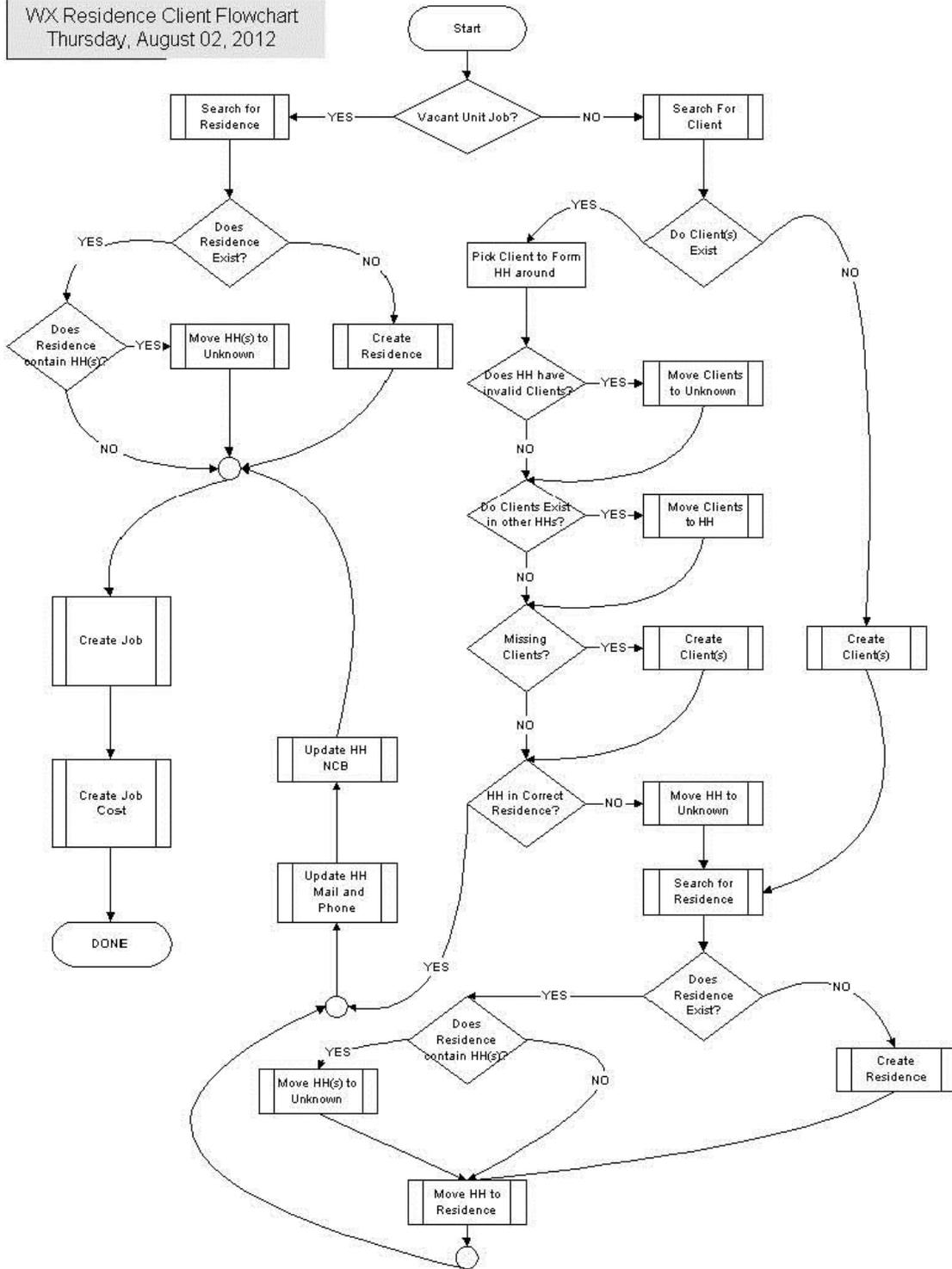


Figure 1-21: [Weatherization Residence Client Flowchart](#)

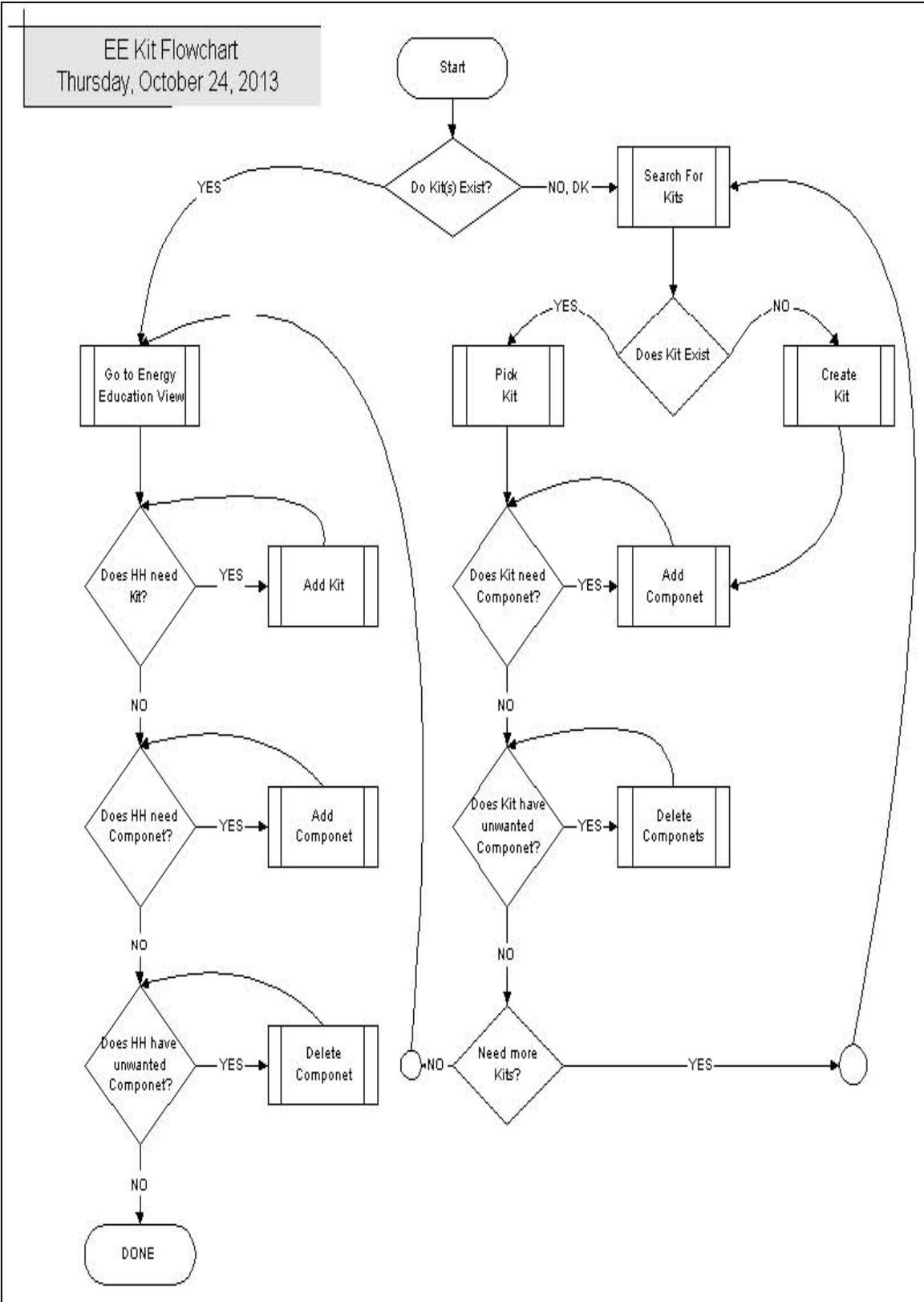


Figure 1-22: [Energy Education Kit Flowchart](#)

Section Two

Client Intake - New

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

Client Search	36
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Residence New	55
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Active Client and Physical Residence	63
Household View, Jobs - Summary	64

Energy Education See Section 5

Kit Components See Section 5

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

Client Search

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

When to use each specific Search Screen

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

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

Setup:

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

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

The screenshot shows the 'Client Search' interface. At the top, there's a navigation bar with 'Client', 'Program', 'Hist', 'Management', 'Reports', and 'Help' menus. The main content area is titled 'Client Search' and contains a search form. The form has several input fields: 'SSN/SYSID', 'Address', 'Unit (ie Apt B)', 'First Name' (containing 'JAMES'), 'Last Name' (containing 'KIRK'), 'City', and 'Zip'. A 'Search' button is prominently displayed and circled in red. Below the search fields, there are checkboxes for 'Show Residence Info. only' and 'Show Residences With Jobs only'. A section titled 'When you Click in Search Results:' provides links for 'Client's SSN = Household Screen', 'Client's Name = Client Screen', and 'Residence Address = Residence Screen'. A note states 'A maximum of 100 results will be returned.' The footer includes 'Oregon Housing and Community Services ©' and 'Data Classification: 3'.

Figure 2-1: Client Search Screen

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

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

Agency: OHCS User: TESTUSER Timeout: 19:50 Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Client Search

Search Parameters (at least one field required)

SSN/SYSID Address Unit (ie Apt B)

First Name City

Last Name Zip

Show Residence Info. only Show Residences With Jobs only

When you Click in Search Results: Search

Client's SSN = Household Screen Advanced Search

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-2: No Results Found

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

Advanced Search

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

Agency: OHCS User: TESTUSER Timeout: 19:50 Log Out Oregon Housing and Community Services

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address [] Unit [] (ie Apt B)
 First Name JAMES City []
 Last Name KIRK Zip []

Show Residence Info. only Show Residences With Jobs only

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

Search Results

No Results Found

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

Data Classification: 3

Figure 2-3A: Client Search Screen

Agency: OHCS User: TESTUSER Timeout: 19:16 Log Out Oregon Housing and Community Services

Advanced Client Search

SSN/SYSID [] First Name [] Last Name []
 Phone 1234567890 (a portion of phone number, number only, no -)

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

Search Results

No Results Found

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

Data Classification: 3

Figure 2-3B: Advanced Client Search Screen

Agency: OHCS User: TESTUSER Timeout: 19:56 Log Out Oregon Housing and Community Services Version 3.1.7T

Client Program Hist Management Reports Help

Advanced Client Search

SSN/SYSID:
 First Name: Last Name:
 Phone: (a portion of phone number, number only, no -)

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

SSN #	First Name	Last Name	Phone Number
██████████	IVAN	CHEKOV	123-456-7890
██████████	RED ONE	SECURITY	123-456-7890
██████████	RED FIVE	SECURITY	123-456-7890
██████████	LEONARD	MCCOY	123-456-7890
██████████	RED TWO	SECURITY	123-456-7890
██████████	RED THREE	SECURITY	123-456-7890
██████████	JAMES TIBEROUS	KIRK	123-456-7890
██████████	XFLHHKGHRHG	SPOCK	123-456-7890
██████████	COMMANDER	SCOTT	123-456-7890
██████████	COMMANDER	UHURA	123-456-7890
██████████	CAPTAIN	SULU	123-456-7890
██████████	RED FOUR	SECURITY	123-456-7890

Data Classification: 3

Figure 2-3C: Advanced Client Search Screen Results

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

Client Search New:

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

Setup:

On the ‘Client Search New’ screen.

1. Enter required fields (without wild cards) with legal first name, last name, SSN/SID, and date of birth (DOB) (reference figure 2-4). The “Create ID” button will automatically create an SID to search for a client who may be assigned a system ID versus a SSN. System ID is created by OPUS (or can be manually done): SYSID sequence is as follows: "S" + first 5 letters of the client’s first name + month, day, year (MMDDYY) of client's birth date.

2. Click the “Search” button. The search button becomes activated when information is typed into any of the boxes. If “No Results found” is displayed, the client can be added as a new client to the OPUS database (reference figure 2-4A).

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 18:21
Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Client Search New

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

First Name: JAMES* DOB: 03-20-1963 (mm-dd-yyyy)*

Last Name: KIRK* Create ID

SSN/Sys#: 123456798*

Search

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-4: Client Search New, no match

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

Client New

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

Setup:

On the 'Client Search New' screen.

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

Agency: OHCS User: TESTUSER Timeout: 15:28 Log Out Oregon Housing and Community Services

Client Search New

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

First Name: JAMES * DOB: 03-20-1963 (mm-dd-yyyy) *
Last Name: KIRK *
SSN/Sys#: 123456798 *

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

Possible Pre-Existing Client Matches

SSN #	First Name	Last Name	DOB
████████	JAMES	KIRK	11-14-1992
████████	JAMES	KRAUSE	12-20-1946
████████	JANNAS NADINE	KRAUSE	11-03-1936
████████	JAMES	KIRK	03-28-1955
████████	JAMES R.	KRUS	11-16-1978
████████	JAMES	KIRK	05-04-1957
████████	JAMES A.	KROSKE	01-11-1942
████████	JAMES TIBEROUS	KIRK	09-25-1960

Add New Member

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-4A: Client Search New



Agency: OHCS

User: TESTUSER
Timeout: 16:24
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Client New

Client Information (Fields marked with * are required.)

Title	MR ▾	Middle	THOMAS
First Name	JAMES *	Suffix	▾
Last Name	KIRK *	SSN/Sys#	123456798 * Create ID
DOB	03-20-1963 (mm-dd-yyyy) *	SSN Verification	YES ▾ *

Comments

2000 characters left (spaces count)

Phone

Primary Phone: 123-456-7890 | 503-555-1212 | EXT: | HOME: ▾ | Type:

Mailing Address*

No.	Direction	Street Name	Type	Direction	Unit	#
1701	▾	FEDERATION	WAY ▾	▾	SPC ▾	10F
City	ST	Zip Code	+4	County		
ENTERPRISE-97828 ▾	OR	97828-ENTERPRISE ▾	▾	WALLOWA		

Client Characteristics

Gender: MALE ▾ *	Disabled: NO ▾ *
Ethnicity: REFUSED ▾ *	Veteran: DON'T KNOW ▾ *
Education: ▾	Language: ▾
Homebound: ▾	Transport: NO ▾

Race (Check all that apply)*

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

Don't Know
 Refused

Oregon Tribes
▾

Non-Cash Benefits (Check all that apply)*

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

Income

Does this client have any income? NONE - ZERO INCOME STATEMENT ▾ *

Zero Income Comments :
Zero Income Comments are required if client has zero income.

Zero Income Comments

450 characters left (spaces count)

[Save](#)

Data Classification: 3

Figure 2-5: Client New screen.

2. Client name, birth date, SYSID/SSN is already filled in from being entered on the 'Client Search New' screen. Complete the rest of the new client information. *Fields marked with * require responses to be selected.* There are several buttons with dropdown arrows for different choices.

- Title; salutation if necessary.
- Legal first name, middle name, last name. *
- Review social security number or system identification number for accuracy.
SSN Quality Code. *
This is to describe if the SSN is full or 'don't know/don't have' or 'refuse' for system identification.
- One phone number, extension, and type.
- Mailing Address: *
The first client created for a household, type their mailing address in provided boxes. For subsequent clients, the select from drop-down menu will display previous mailing addresses.
 - Street number, Street direction: S, N, NE, NW, etc.
 - Street name.
 - Street type: Ave, Lane, etc.
 - Unit type: Apt, Unit, PO Box, etc.
 - Enter an apt number or PO Box number.
 - City or Zip Code
- Gender *
- Disabled *
- Veteran *
- Ethnicity *
- Language.
- Education.
- Homebound
- Transportation (if Homebound set to 'YES')
- Race.*
- Oregon Tribe Option (if Native American has been selected)
- Non-Cash benefits client receives *
- Does this client have any income *
(None, Yes, None-Zero Income Statement, Don't Know, Refused).
If 'None-Zero Income Statement' is selected a required 'Zero Income Comment' block appears; otherwise it is hidden.

Click the 'Save' button.

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

Client View

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

OPUS Weatherization Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 19:24
 Residence: ENTERPRISE, OR 97828 Log Out
 Client Program Hist Management Reports Help Oregon Housing and Community Services
 Version 3.1.7T

Client View
 Select Another Client in HH: MR JAMES THOMAS KIRK

Client Information
 Name: MR JAMES THOMAS KIRK SSN/SYS ID#: 123-45-6798
 DOB: 03-20-1963 Age: 52
 SSN Verification: YES
 Comments:

Phone: 503-999-8422 Type: HOME Edit Delete
 Phone: 503-999-9999 Type: CELL Edit Delete
 Phone: 800-555-9422 Type: CELL Edit Delete
 Phone: * Ext: Type: CELL * Add

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

Client Characteristics
 Gender: MALE Disability: NO
 Ethnicity: HISPANIC/LATINO Veteran: DON'T KNOW
 Education: UNKNOWN Language: UNKNOWN
 Homebound: UNKNOWN Race: REFUSED
 Oregon Tribe:
 Edit Client View Household

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020

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

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

Data Classification: 3
 Oregon Housing and Community Services ©

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



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 18:14
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

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

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

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

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

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

Client View

Select Another Client in HH

Client Information

Name: MR JAMES THOMAS KIRK **SSN/SYS ID#** 123-45-6798
DOB: 03-20-1963 **Age:** 52
SSN Verification: YES

Comments:

Phone: 503-999-8422 **Type:** HOME
Phone: 503-999-9999 **Type:** CELL
Phone: 800-555-9422 **Type:** CELL
Phone: * **Ext:** **Type:** *

Mailing Address

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

Client Characteristics

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020

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

Does this client have any income? ▾
Zero Income Comments:

This field is required if zero income is selected.

1950 characters left (spaces count)

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

[Data Classification: 3](#)

Oregon Housing and Community Services ©

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

Agency: OHCS User: TESTUSER Timeout: 19:48

Client Program Hist Management Reports Help

Client Search New Edit

Residence View New Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Client Search New

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

First Name: JAMES * DOB: 03-20-1963 (mm-dd-yyyy)*

Last Name: KIRK * Create ID

SSN/Sys#: 123456789 * Search

OPUS will search the d ; client before creating a new record.

Possible Pre-Existing Client Matches

SSN #	First Name	Last Name	DOB
No Results Found			

Add New Member

Data Classification: 3

Oregon Housing and Community Services ©

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

Household Mail and Phone Update

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

Agency: OHCS Client: MR JAMES THOMAS KIRK Residence: ENTERPRISE, OR 97828 User: TESTUSER Timeout: 19:09

Client Program Hist Management Reports Help

Client Search View New Edit

Residence View New Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Client View

Select Another Client in HH MR JAMES THOMAS KIRK Go

Client Information

Name: MR JAMES THOMAS KIRK SSN/SYS ID#: 123-45-6798

DOB: 03-20-1963 Age: 52

SSN Verification: YES

Comments:

Phone: 503-999-8422 Type: HOME Edit Delete

Phone: 503-999-9999 Type: CELL Edit Delete

Phone: 800-555-9422 Type: CELL Edit Delete

Phone: * Ext: Type: CELL * Add

Mailing Address

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

Client Characteristics

Figure 2-8A: Client View Screen

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

OPUS Weatherization Agency: OHCS Client: CAROLE MARCUS User: TESTUSER Timeout: 18:47 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.0.0T

Household Mail and Phone Update

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

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

No.	Direction	Street Name	Type	Direction	Unit	#

City: _____ ST Zip: _____ County: _____
OR _____ +4

Update Mailing Address

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

DR DAVID MARCUS

Phone: 971-000-1111 Type: CELL Edit Delete

Phone: * Ext: * Type: CELL Add Add HH Delete HH

CAROLE MARCUS

Phone: 800-555-9422 Type: CELL Edit Delete

Phone: * Ext: * Type: CELL Add Add HH Delete HH

MR JAMES THOMAS KIRK

Phone: * Ext: * Type: CELL Add Add HH Delete HH

Data Classification: 3

Oregon Housing and Community Services ©

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

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

OPUS Weatherization

Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 12:24
 Residence: ENTERPRISE, OR 97828 Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Household Mail and Phone Update

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

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

No. Direction Street Name Type Direction Unit #

City ST Zip Code +4 County

--Select One-- OR --Select One--

Update Mailing Address

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

LEONARD MCCOY III

Phone: 503-555-1212 Type: HOME Edit Delete

Phone: 800-555-0000 * Ext: Type: PAGER Add Add HH Delete HH

MR JAMES THOMAS KIRK

Phone: 503-999-8422 Type: HOME Edit Delete

Phone: 503-999-9999 Type: CELL Edit Delete

Phone: 800-555-9422 Type: CELL Edit Delete

Phone: Ext: Type: CELL Add Add HH Delete HH

CAROLE MARCUS

Phone: 503-986-6704 * Ext: Type: WORK Add Add HH Delete HH

DR DAVID MARCUS

Phone: 974-000-1111 Type: CELL Edit Delete

Phone: 800-555-9422 Type: CELL Edit Delete

Phone: Ext: Type: CELL Add Add HH Delete HH

JEAN-LUC PICARD

Phone: 503-999-8422 Type: CELL Edit Delete

Phone: Ext: Type: CELL Add Add HH Delete HH

Save Cancel

Data Classification: 3

Oregon Housing and Community Services ©

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

Non-Cash Benefits Update

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



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:07



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

Client
 Search
 View

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

Client View

Select Another Client in HH

Client Information

Name: MR JAMES THOMAS KIRK SSN/SYS ID# [REDACTED]
 DOB: 03-20-1963 Age: 52
 SSN Verification: YES

Comments:

Phone: 503-999-8422 Type: HOME
 Phone: 503-999-9999 Type: CELL
 Phone: 800-555-0000 Type: PAGER
 Phone: 800-555-9422 Type: CELL
 Phone: * Ext: Type: *

Mailing Address

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

Client Characteristics

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020

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

Does this client have any income?

Zero Income Comments:

1948 characters left (spaces count)

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

Data Classification: 3

Figure 2-9A: Client View Screen

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

OPUS Weatherization Agency: OHCS Client: MR JAMES THOMAS KIRK Residence: ENTERPRISE, OR 97828 User: TESTUSER Timeout: 19:20 Log Out Oregon Housing and Community Services

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

Client Edit

Client Information (Fields marked with * are required.)

Title: MR
First Name: JAMES * Middle: THOMAS
Last Name: KIRK * Suffix:
DOB: 03-20-1963 (mm-dd-yyyy) * SSN/Sys#: [REDACTED] * Create ID
SSN Verification: YES *

Comments
2000 characters left (spaces count)

Mailing Address*
(Choose an address from the list, add a new address, or edit the current mailing address below)
Edit Current Mailing Address
"HOMELESS" is not a valid address: If no permanent address, enter physical location where they sleep under street name: e.g., Oak St. Bridge at 3rd St; Super Center Parking Lot on Main; ¼ miles past mile post marker 35 on Hwy 166.

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

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

Client Characteristics

Gender: MALE * Disabled: NO *
Ethnicity: HISPANIC/LATINO * Veteran: DON'T KNOW *
Education: * Language: *
Homebound: * Transport: NO

Race (Check all that apply)*
 African American
 American Indian/Alaska Native
 Asian
 Native Hawaiian or Pacific Islander
 White
 Don't Know
 Refused
 Oregon Tribes:

Non-Cash Benefits (Check all that apply)*
 NAP
 WIC
 TANF Trans
 Other Health Ins
 Oregon Health Plan
 VA Med Serv
 Other TANF
 Other Source
 MEDICARE
 TANF Child Care
 Public Rental Assist
 Temp Rental Assist
 None
 Don't Know
 Refused

Save Changes

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-9B: Client Edit Screen



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:07
[Log Out](#)



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Version 3.1.7T

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

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

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

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

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

Client View

Select Another Client in HH:

Client Information

Name: MR JAMES THOMAS KIRK SSN/SYS ID#: 123-45-6798
 DOB: 03-20-1963 Age: 52
 SSN Verification: YES

Comments:

Phone: 503-999-8422 Type: HOME
 Phone: 503-999-9999 Type: CELL
 Phone: 800-555-0000 Type: PAGER
 Phone: 800-555-9422 Type: CELL
 Phone: * Ext: Type: *

Mailing Address

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

Client Characteristics

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020

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

Does this client have any income?

Zero Income Comments:

This field is a required if zero income is selected.

1948 characters left (spaces count)

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

Data Classification: 3

Oregon Housing and Community Services ©

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

Income & Employer

Setup:

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

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



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:24



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Client View

Select Another Client in HH

Client Information

Name: MR JAMES THOMAS KIRK SSN/SYS ID# 123-45-6798
 DOB: 03-20-1963 Age: 52

SSN Verification: YES
 Comments:

Phone: 503-999-8422 Type: HOME
 Phone: 503-999-9999 Type: CELL
 Phone: 800-555-9422 Type: CELL
 Phone: * Ext: Type: *

Mailing Address

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

Client Characteristics

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020

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

Does this client have any income?

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-10: Income/Employer

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

Type or Select:

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

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

The screenshot shows the OPUS Weatherization software interface. At the top, there is a header with the OPUS logo, agency information (Agency: OHCS, Client: MR JAMES THOMAS KIRK, Residence: ENTERPRISE, OR 97828), user information (User: TESTUSER, Timeout: 18:25), and a Log Out button. Below the header is a navigation menu with tabs for Client, Program, Hist, Management, Reports, and Help. The main content area is titled 'Income/Employer New' and contains a form for entering income information. The form has several sections: 'Income (Fields marked with * are required.)' with fields for Source (STATE OF OREGON), Type (UNEMPLOYMENT), Amount (250.00), Frequency (Monthly), Verified How (Check Pay Stub), Verified By (TNU), and Verified Date (04-13-2015). There is also a Comments field. Below this is the 'Employer Information' section with fields for Phone, Ext, Address 1, Address 2, and City, State Zip. A 'Save' button is circled in red. The footer of the form includes 'Data Classification: 3' and 'Oregon Housing and Community Services ©'.

Figure 2-11: Income & Employer

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



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:24
[Log Out](#)



[Client](#) | [Program](#) | [Hist](#) | [Management](#) | [Reports](#) | [Help](#)

Version 3.1.7T

Client View

Select Another Client in HH MR JAMES THOMAS KIRK [Go](#)

Client Information

Name: MR JAMES THOMAS KIRK **SSN/SYS ID#** 123-45-6798
DOB: 03-20-1963 **Age:** 52
SSN Verification: YES

Comments:

Phone: 503-999-8422 **Type:** HOME [Edit](#) [Delete](#)
Phone: 503-999-9999 **Type:** CELL [Edit](#) [Delete](#)
Phone: 800-555-9422 **Type:** CELL [Edit](#) [Delete](#)
Phone: * **Ext:** **Type:** CELL [Add](#)

Mailing Address

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

Client Characteristics

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

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020

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

Does this client have any income? YES [Save](#)

Type	Source/Emp	Monthly	Annual	Verified Date	Last 90 Days	Exclude
UNEMPLOYMENT	STATE OF OREGON	\$250.00	\$3,000.00	04-13-2015	N	N
Total		\$250.00	\$3,000.00			

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-12: Income & Employer screen.

Residence Search

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

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

Residence New

Setup:

While in the ‘Client Search’ screen.

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

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

4. When a residence is found in the database, the address, city and zip code will be displayed in the ‘Search Results’.
5. If the residence is not in the result list, you’ll see ‘No Results Found’ (*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 2-13: 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).

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

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.

DRAFT

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*).



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:41



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Household View

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

HH Members										Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	89	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	██████████	CAROLE MARCUS	52	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020

Address

T	Address
M	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828
B	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

JAMES THOMAS KIRK	\$1,200.00
-------------------	------------

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

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

Make any changes?

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-15: Adding new client to HH

Add Clients to Household (cont).

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.

Agency: OHCS User: TESTUSER Timeout: 19:30 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.1.7T

Client Search New

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

First Name: DAVID* DOB: 04-30-1980 (mm-dd-yyyy)*
Last Name: MARCUS* Create ID
SSN/Sys#: SDAVID043080* Search

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

Possible Pre-Existing Client Matches

SSN #	First Name	Last Name	DOB
████████	DAVID JOSEPH	MARCUS	04-11-1952
████████	DAVID	MORSE JR	05-12-1993
████████	DAVID	MARQUEZ	05-09-1998
████████	DAVID KENNETH	MARQUEZ	03-04-1976
████████	DAVID	MARQUEZ CASTILLO	09-20-2001
████████	DAVID B	MARQUEZ	03-04-2010
████████	DAVID J	MARQUIS BLOOMQ	05-05-2001

Add New Member

Data Classification: 3

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Figure 2-16: Add new HH member search

Add Clients to Household (cont).



Agency: OHCS

User: TESTUSER
Timeout: 18:44
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

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

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

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

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

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

Client New

Version 3.1.7T

Client Information (Fields marked with * are required.)

Title

First Name *

Last Name *

DOB (mm-dd-yyyy)*

SSN Verification

Comments

2000 characters left (spaces count)

Middle

Suffix

SSN/Sys# * [Create ID](#)

Phone

Primary Phone EXT Type

Mailing Address*

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

City ST Zip Code +4 County

Client Characteristics

Gender: <input type="text"/>	Disabled: <input type="text"/>
Ethnicity: <input type="text"/>	Veteran: <input type="text"/>
Education: <input type="text"/>	Language: <input type="text"/>
Homebound: <input type="text"/>	Transport: <input type="text" value="NO"/>

Race (Check all that apply)*

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

Non-Cash Benefits (Check all that apply)*

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

Income

Does this client have any income?

[Save](#)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 2-17: HH member new

2. For each household member, enter or select from the following:
 - Salutation, if needed, First Name, and Last Name.
 - Date of birth and SSN or click the 'Create System ID' button. As stated in creating a new client, a System ID is created by OPUS: OPUS creates a SYSID as follows: "S" + first 5 letters of the clients first name + month, day and two digit year of client's birth date.
 - Phone number, PH Extension,
 - Select PH Type.
 - Mailing Address. Select an address from the drop-down menu if the mailing address has been entered previously for another member in household, or enter a new address.
 - Select gender, veteran status, language, homebound, disabled, ethnicity, education level, transportation? and race.
 - Select Non-Cash Benefits received by this person.
 - Does Client have any income drop-down.

Click 'Save' Button.

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Client View

Select Another Client in HH

Client Information

Name: DR DAVID MARCUS SSN/SYS ID#: SDAVID060280
DOB: 06-02-1980 Age: 35

SSN Verification: YES

Comments:

Phone: 800-555-0000 Type: PAGER
Phone: 800-555-9422 Type: CELL
Phone: 974-000-1111 Type: CELL
Phone: * Ext: Type: *

Mailing Address

PO BOX 21
BANDON, OR 97411 County COOS

Client Characteristics

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

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

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

Does this client have any income?

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
SOCIAL SECURITY DISABILITY INCOME	SOCIAL SECURITY ADMINISTRATION	\$100.00	\$1,200.00	07-06-2014	N	N
<input type="button" value="New Income"/>	Total	\$100.00	\$1,200.00			

Data Classification: 3

Figure 2-18: HH member added view

The 'Client View' screen will appear (*reference figure 2-18*). If changes need to be made, click the 'Client Edit' link in the left Nav Bar, or the 'Edit Client' button. Make the necessary changes, and click 'Save Changes' button. More clients can be added to the household as necessary by repeating the same steps. If all the clients have been added to the household, proceed to the 'Household View' screen to finish the client intake process, see next section for this process.

Active Client and Physical Residence

The 'Client' display and the 'Residence' display at the top of the screen. The client shown indicates the last active client record added/accessed and the residence shows the active physical residence created for household. (*reference figure 2-19*).

The red "person" icon represents an active client record added, and the red "house" icon represents an active physical residence created for this household. Scrolling the mouse over the red person icon shows the name of the client that is being worked on and the red house icon will display the physical address for the current household

OPUS Weatherization

Agency: ONCS
Client: DR DAVID MARCUS
Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:48
 Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Household View

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

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SJEANLU051125	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	SCAROLE051162	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	123-45-6798	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	SDAVID060280	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y
<input type="checkbox"/>	SLEONAR010100	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Figure 2-19: Household view Red Icons

Household View

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

Setup:

On the 'Client View' screen:

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

(reference figure 2-20).

This screen is organized as follows:

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

Client

Search
View
New
Edit

Residence

View
New
Edit

Household

View
Mail/Ph Update
NCB Update

Move

Client to HH
HH to Residence
Merge HH

Energy Education

View
Kit Component New

Household View

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

HH Members					Bold Red elements indicate poor data quality							
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SJEANLU051125	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	SCAROLE051162	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	123-45-6798	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	SDAVID060280	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y	
<input type="checkbox"/>	SLEONAR010100	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Household Summary

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

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Figure 2-20: HH View, Jobs, Summary screen.

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

DRAFT

Section Three

Client Intake – Existing

The user will learn how to update and edit existing household records in the OPUS database in this section. These records include client, residence, income, employer, and household summary. Using data-entry screens, all records updated and edited prepare the database to assimilate required information to qualify a household for program assistance.

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Move Household to New Residence	107
Move Household to Existing Residence	112
Merge Household with Another Household	116
Energy Education	See Section 5
Kit Components	See Section 5

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

Client Search

Search the OPUS database for existing client information before creating new records and to prevent duplicate records.

Setup:

On the 'Message of the Day' Screen.

1. Click the 'Search Client' link on the 'Left Nav Bar' or from the 'Main Menu' under 'Client'.
2. For each client in the household, and with one search at a time, type a person's first, last name OR SSN/SYSID - **without dashes** (reference figure 3-1).

Note: The search results will display only 100 records results at random that match the criteria you entered. It's important to provide as much search criteria as possible, so that your results will narrow down to a reasonable number returned records. Or the search results will indicate 'No Results Found'.

3. Click the 'Search' Button. The search button becomes activated when information is typed into any of the boxes.

The screenshot shows the OPUS Weatherization Client Search interface. At the top, it displays the agency name 'OHCS', the user 'TESTUSER', and a timeout of '19:24'. There is a 'Log Out' button and a navigation menu with options like 'Client', 'Program', 'Hist', 'Management', 'Reports', and 'Help'. The main content area is titled 'Client Search' and includes a 'Search Parameters (at least one field required)' section. This section has input fields for 'SSN/SYSID', 'Address', 'Unit (ie Apt B)', 'First Name' (containing 'JAMES'), 'Last Name' (containing 'KIRK'), 'City', and 'Zip'. A 'Search' button is prominently displayed and circled in red. Below the search fields, there are checkboxes for 'Show Residence Info. only' and 'Show Residences With Jobs only'. A section titled 'When you Click in Search Results:' provides links to 'Client's SSN = Household Screen', 'Client's Name = Client Screen', and 'Residence Address = Residence Screen'. A note states 'A maximum of 100 results will be returned.' The footer includes 'Oregon Housing and Community Services ©' and 'Data Classification: 3'.

Figure 3-1: Client Search Screen

When the search is successful, the client's information will show in the 'Search Results' section (reference figure 3-1). Repeat a search for each client in household. In the 'Search Results', client's system ID, first name, last name, address, city and zip code will display.

Agency: OHCS User: TESTUSER Timeout: 19:57 Log Out Oregon Housing and Community Services Version 3.1.7T

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address [] Unit [] (ie Apt B)

First Name JAMES City []

Last Name KIRK Zip []

Show Residence Info. only Show Residences With Jobs only

When you Click in Search Results: Search

Client's SSN = Household Screen Advanced Search

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
[REDACTED]	JAMES	KIRK	1992	375 FAIRVIEW AVE SE	APT 210	SALEM
[REDACTED]	JAMES	KIRK	1955	1820 EARLE ST		KLAMATH FALLS
[REDACTED]	JAMES	KIRK	1957	604 JUNIPER DR		PENDLETON
[REDACTED]	JAMES TIBEROUS	KIRK	1960	1701 N ENTERPRISE WAY		SALEM
***-**-6798	JAMES THOMAS	KIRK	1963	1701 FEDERATION WAY	STE 10F	ENTERPRISE

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-2: Client search with results

When a search is unsuccessful, a message 'No Results Found' will display under the 'Search Results'. Be sure to repeat a search for *each client* in the household before adding a client to a household. **Note:** Searching by other fields on the search screen, such as first name or last name can be attempted. Be sure to remove the SYSID/SSN when searching by first and last name. This allows the system to find a person if they have a different ID number.

- Kirk was found in the database. The blue and underlined links in the columns signify links to other screens. After a link has been used, it turns to a dark pink color for a period of time (*reference figure 3-2*).

The following linked columns take you to respective view screens:

- Click on SSN/SYSID to view 'Household View' screen.
- Click on the first or last name links to view the 'Client View' screen.
- Click on the address, unit or zip to view the 'Residence View' screen.

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

It is recommended that following a client search, to view a client's household View Screen by clicking the client's social security number or system ID number. From the Household View screen, the user will be able to see if there are other client(s) associated with the household (HH). If a user finds household members in a specific HH, the user won't have to search each client individually, since the client was found within the HH and the user will know they have a record in the database. Click Kirk's SYSID to bring up the HH view.



Agency: OHCS
 Client: DR DAVID MARCUS
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 18:03



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Client
 Search
 View
 New
 Edit

Residence
 View
 New
 Edit

Household
 View
 Mail/Ph Update
 NCB Update

Move
 Client to HH
 HH to Residence
 Merge HH

Energy Education
 View
 Kit Component New

Household View

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

HH Members					Bold Red elements indicate poor data quality							
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SJEANLU051125	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	SCAROLE051162	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	123-45-6798	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	SDAVID060280	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y	
<input type="checkbox"/>	SLEONAR010100	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

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

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-3: HH view

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

1. Marcus’s household includes other members.
2. The Marcus HH address. If the address on the application is different from what is displayed on the HH view screen, the address will need to be updated. To update the address and/or phone number, click on ‘Residence View’ from the ‘Left Nav Bar’. The ‘Residence View’ will appear (*reference figure 3-4*).

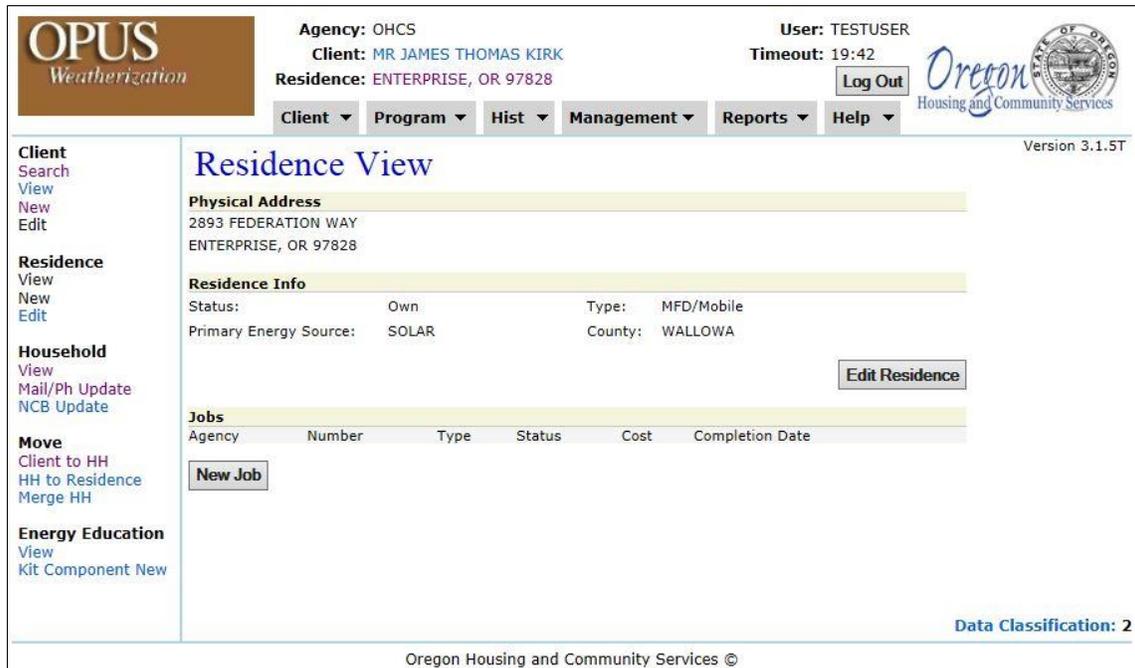


Figure 3-4: Residence View and Edit

3. The HH includes a third person who meets the definition of a HH member. If a new application was to include a fourth person not yet in the system, the HH information would require an update to add another person.

A review of the ‘Household View’ screen from the initial client search makes it easy and quick to discover any information that would require to be updated. When updating residence information, always search for the *new* address first. From a residence search, you can determine how to proceed from one of the following scenarios:

- If the residence address is found in the database without a household living in it, the address can be used for the household. Use guidelines in topic **Move Household to Residence**.
- If the address is found in the database with a household in it and the HH is not active in a program, then the “old HH” can be moved into “Unknown” and the new HH can use the address. Use the guidelines in topic **Move Household to Unknown**, and **Move Household to Residence**.
- If a HH is in the system with an old address and the new residence does not exist, it can be added then moved to the HH from the old residence to the new one, using steps in topic **Move Household to a new Residence**. Remember to complete a “Residence Search” before adding a new one.

Residence Search

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

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

Setup:

On the ‘Client Search’ screen.

1. In the address box, type a street number and street name (with spaces between as needed).
If you don't have a street number, use a "%" in front of the street name, such as % Stevens St.
2. If there is an apartment or unit number, use one of these formats: Apt #, Unit #, or Space #.
3. Type a city and zip code to narrow the results to this region of the state.

Note: At any time, searching for a client by address, the percent symbol (%) is considered a ‘wild card’. Enter the percent sign followed by the street name then click ‘Search’, the system will search for any addresses close to matching what you entered (*reference figure 3-5*).

The screenshot displays the OPUS Weatherization Client Search interface. At the top, the agency is identified as OHCS, the user as TESTUSER, and the timeout as 19:56. A navigation menu includes Client, Program, Hist, Management, Reports, and Help. The search parameters section, highlighted with a red circle, contains the following fields: SSN/SYSID, First Name, Last Name, Address (containing "%FEDERATION"), City (containing "ENTERPRISE"), and Unit (containing "(ie Apt B)"). Below the search parameters, there are checkboxes for "Show Residence Info. only" and "Show Residences With Jobs only". A "Search" button is present, along with a link for "Advanced Search". The search results section shows "No Results Found". The footer includes the Oregon Housing and Community Services logo and the text "Data Classification: 3".

Figure 3-5: Client Search

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

OPUS Weatherization Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 19:45
 Residence: ENTERPRISE, OR 97828 Log Out
 Oregon Housing and Community Services
 Client Program Hist Management Reports Help Version 3.1.7T

Household View

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

HH Members											
Bold Red elements indicate poor data quality											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y
<input type="checkbox"/>	[REDACTED]	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client **Remove Client(s) from Household**

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

To Remove Household: Click this button **Move Entire Household to Unknown**

Jobs					
Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address		Income Summary	
T	Address	DR DAVID MARCUS	\$1,200.00
M	PO BOX 21 BANDON, OR 97411		
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828		

Household Summary	
Total Income	\$1,200.00
% of Poverty	4%

Figure 3-6: HH View with address

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

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

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 19:53 Log Out Oregon Housing and Community Services

Client Search

Client Search View New Edit

Residence View **New** Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Client Search

Search Parameters (at least one field required)

SSN/SYSID Address Unit (ie Apt B)

First Name City

Last Name Zip

Show Residence Info. only Show Residences With Jobs only

When you Click in Search Results: Advanced Search

Client's SSN = Household Screen

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-7: Client Search for residence

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 19:56 Log Out Oregon Housing and Community Services

Client Search View New Edit

Residence View New **New** Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Residence New

Physical Address

PO Box is not a valid residence address.

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

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

City St. Zip Code +4 County

Residence Info

Residence Type * Residence Status *

Primary Energy Source *

Data Classification: 2

Oregon Housing and Community Services ©

Figure 3-8: Residence New

Verifying Data on Views

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

DRAFT

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*).

The screenshot shows the 'Residence View' interface. On the left is a navigation menu with categories: Client, Residence, Household, Move, and Energy Education. The main area displays 'Residence View' for client 'OHCS' at 'ENTERPRISE, OR 97828'. It shows physical address, residence info (Status: Unknown, Type: House, Primary Energy Source: SOLAR, County: WALLOWA), and a table for jobs. A red circle highlights the 'Edit Residence' button in the top right of the main content area.

Figure 3-9: in the Client View

Figure 3-9A: Residence View, Edit

The screenshot shows the 'Residence Edit' interface. The left sidebar is identical to Figure 3-9. The main area is titled 'Residence Edit' and contains a form. A warning message states: 'Do not edit the address unless the building has physically moved to a new location or the address is incorrect. If the household has moved create a new residence.' The 'Edit Residence Address' checkbox is checked and circled in red. Below this are fields for No. (2893), Direction (FEDERATION), Street Name (WAY), Type (WAY), Direction Unit, #, City (ENTERPRISE-97828), St. (OR), Zip Code (97828-ENTERPRISE), County (WALLOWA), and Residence Info (Type: House, Status: Unknown, Primary Energy Source: SOLAR). A red circle highlights the 'Save' button at the bottom right.

Figure 3-9B: Residence Edit screen

If proceed you will receive a warning screen (*reference figure 3-9C*) 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’.

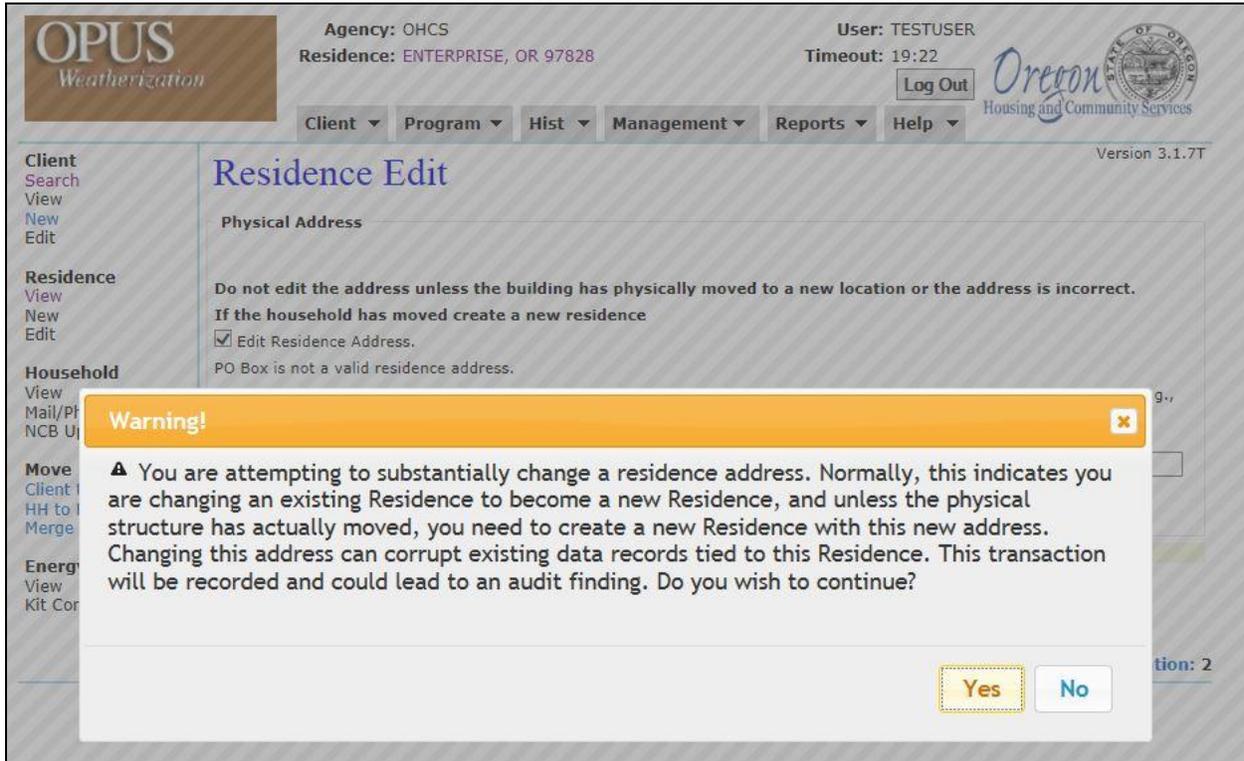


Figure 3-9C: Residence Edit – Warning

Add Client(s) to Existing Household

Adding clients to an existing household is easiest when at least one client and the residence have been initially created.

Setup:

On the 'Search Client' screen, as mentioned in the previous topics, searching for a client who needs to be added to an existing household prevents creating duplicate records. If a search locates clients living in a different household, follow steps in topic **Merge Household with another Household** (reference figure 3-31).

Search Household to Add Client(s) to:

1. Search for the household member that needs to be added to the HH. On the 'Search Client' screen, type in the client's name or SSN/SYSID. Click 'Search' button.

The screenshot displays the 'Client Search' interface. At the top, the agency is 'OHCS' and the user is 'TESTUSER'. The search parameters are as follows:

SSN/SYSID	Address	Unit
First Name: JAMES	City	(ie Apt B)
Last Name: KIRK	Zip	

There are checkboxes for 'Show Residence Info. only' and 'Show Residences With Jobs only'. A 'Search' button is circled in red. Below the search area, instructions are provided: 'When you Click in Search Results: Client's SSN = Household Screen, Client's Name = Client Screen, Residence Address = Residence Screen'. A note states 'A maximum of 100 results will be returned.' The footer includes 'Oregon Housing and Community Services ©' and 'Data Classification: 3'.

Figure 3-10: Client Search

2. In the results, click the client's SSN number link to access 'Household View' screen (reference figure 3-11).


 Agency: OHCS

 User: TESTUSER
 Timeout: 19:51
[Log Out](#)


[Client](#) ▾ [Program](#) ▾ [Hist](#) ▾ [Management](#) ▾ [Reports](#) ▾ [Help](#) ▾

Version 3.1.7T

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

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

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

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

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

Client Search

Search Parameters (at least one field required)

SSN/SYSID
 Address
 Unit (ie Apt B)

First Name
 City

Last Name
 Zip

Show Residence Info. only
 Show Residences With Jobs only

When you Click in Search Results:

[Advanced Search](#)

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

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
██████████	JAMES	KIRK	1992	375 FAIRVIEW AVE SE	APT 210	SALEM
██████████	JAMES	KIRK	1955	1820 EARLE ST		KLAMATH FALLS
██████████	JAMES	KIRK	1957	604 JUNIPER DR		PENDLETON
██████████	JAMES TIBEROUS	KIRK	1960	1701 N ENTERPRISE WAY		SALEM
***-**-6798	JAMES THOMAS	KIRK	1963	1701 FEDERATION WAY	STE 10F	ENTERPRISE

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-11: Client Search New with results

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

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Household View

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

HH Members							Bold Red elements indicate poor data quality					
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	██████████	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y	
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Household Summary

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

Make any changes? **Save Changes**

HH Comments

This is the hh coments section which allows a total of 2000 characters.

1929 characters left (spaces count)

Data Classification: 3

Figure 3-12: HH view, New Client button

Figure 3-13: Add new HH member Search

On the Client Search New screen, under ‘Possible Matches’, clients will appear if the name and or SSN/SYSID number is close to the search criteria entered. If the ‘Possible Matches’ do not match the client in question, click on the ‘Add New Member’ button. The ‘Client New’ screen will appear. *Fields marked with * require responses to be selected.*

4. Type or select the following:

- Title, Salutation, as needed.
- Legal first name, middle name, last Name *.
- Date of Birth.
- SSN or choose SYSID instead.
- SSN Quality Code *
This is to describe if the SSN is full or ‘don’t know/don’t have’ or ‘refused’ for system identification.
- Phone number is the same as the others in HH, should not have to re-enter.
- Gender *
- Disabled *
- Veteran *
- Language
- Ethnicity *
- Education.
- Homebound
- Mailing Address *

In the example above (*reference figure 3-13*), the mailing address will be the same as the others in the household. Address selections can be made from the drop-down menu previously entered for other clients in household and skip the steps below.

- Street Number, Street Name, Street Direction such as: S, N, NE, NW, etc.
- Street Type such as: Ave, Lane, etc.
- Unit Type such as: Apt, Unit, Bldg, PO Box, etc., # - for and apt number or PO Box #

- Enter an apt number or PO Box number
- City or Zip Code
- Non-Cash Benefits the client currently receives.
- Click the 'Save' Button to save the client information (*reference figure 3-14, next page*).

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

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 17:16 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.1.7T

Client New

Client Information (Fields marked with * are required.)

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

2000 characters left (spaces count)

Phone Primary Phone EXT Type

Mailing Address* No. Direction Street Name Type Direction Unit # City ST Zip Code +4 County

Client Characteristics Gender: * Ethnicity: * Education: * Homebound: Disabled: * Veteran: * Language: * Transport: *

Race (Check all that apply)* African American American Indian/Alaska Native Asian Native Hawaiian or Pacific Islander White Don't Know Refused Oregon Tribes

Non-Cash Benefits (Check all that apply)* SNAP TANF Trans Other Health Ins Oregon Health Plan VA Med Serv Other TANF Other Source MEDICARE TANF Child Care Public Rental Assist Temp Rental Assist None Don't Know Refused

Income Does this client have any income? *

Data Classification: 3 Oregon Housing and Community Services ©

Figure 3-14: HH Client New

Click the 'Save' button.

Double-check the information to ensure it is correct. On the 'Client View' screen, a user can select another household member from the top right drop-down menu called 'Select Another Client in HH'. This is an easy way to get to another HH member 'Client View' screen if information requires to be updated, (reference figure 3-15). The figure below shows in detail the HH selection (reference figure 3-15A).

OPUS Weatherization Agency: OHCS Client: MONTGOMERY SCOTT User: TESTUSER Timeout: 19:08 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Client View Version 3.1.7T

Select Another Client in HH **MONTGOMERY SCOTT** Go

Client Information
 Name: MONTGOMERY SCOTT SSN/SYS ID#: SMONTG0051162
 DOB: 05-11-1962 Age: 53
 SSN Verification: YES
 Comments:

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

Mailing Address
 PO BOX 21
 BANDON, OR 97411 County COOS

Client Characteristics
 Gender: MALE Disability: REFUSED
 Ethnicity: REFUSED Veteran: YES
 Education: UNKNOWN Language: UNKNOWN
 Homebound: UNKNOWN Race: REFUSED
 Oregon Tribe:
 Edit Client View Household

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date	
Income/Employer (Setting to None, None - Zero Income, Don't Know or Refused will delete all income)						
Does this client have any income? NONE						
Save						
Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
Total		\$0.00	\$0.00			

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-15: HH member view selection

OPUS
Weatherization

Agency: OHCS
Client: LEONARD MCCOY III
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 15:40
Log Out

Oregon
Housing and Community Services

Version 3.1.7T

Client View

Select Another Client in HH: **CAROLE MARCUS** Go

Client Information

Name: LEONARD MCCOY III SSN/SYS ID# SLEONAR010100
DOB: 01-01-2000 Age: 14
SSN Verification: EXCEPTION
Comments:

Figure 3-15A: HH member view selection

DRAFT

Client Edit

Setup:

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

OPUS Weatherization Agency: OHCS Client: MONTGOMERY SCOTT User: TESTUSER
 Residence: ENTERPRISE, OR 97828 Timeout: 19:52 Log Out Oregon Housing and Community Services
 Client Program Hist Management Reports Help Version 3.1.7T

Client View
 Select Another Client in HH:

Client Information
 Name: MONTGOMERY SCOTT SSN/SYS ID#: SMONTG0051162
 DOB: 05-11-1962 Age: 53
 SSN Verification: YES
 Comments:
 Phone: 800-555-9422 Type: HOME
 Phone: * Ext: Type: *

Mailing Address
 ADDRESS UNKNOWN
 ENTERPRISE, OR 97828 County: UNKNOWN

Client Characteristics
 Gender: MALE Disability: REFUSED
 Ethnicity: REFUSED Veteran: YES
 Education: UNKNOWN Language: UNKNOWN
 Homebound: UNKNOWN Race: REFUSED
 Oregon Tribe:

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date

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

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-16: Client view to edit information

- Once the correct name is selected, click the 'Go' button. The 'Client View' screen will appear next. On the Left Nav Bar, click the 'Client Edit' link, *or* click the 'Edit Client' button under the 'Client Information' section (reference figure 3-16). The 'Client Edit' screen will appear next (reference figure 3-17A).

OPUS Weatherization Agency: OHCS Client: MONTGOMERY SCOTT User: TESTUSER
 Residence: ENTERPRISE, OR 97828 Timeout: 18:29 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.1.7T

Client Edit

Client Information (Fields marked with * are required.)

Title First Name MONTGOMERY* Middle
 Last Name SCOTT* Suffix
 DOB 05-11-1962 (mm-dd-yyyy)* SSN/Sys# SMONTGO05116* Create ID
 SSN Verification YES*

Comments

2000 characters left (spaces count)

Mailing Address*

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

Edit Current Mailing Address

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

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

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

Client Characteristics

Gender: MALE* Disabled: NO*
 Ethnicity: NON-HISPANIC/NON-LATINO* Veteran: YES*
 Education: Language: ENGLISH*
 Homebound: NO* Transport: NO*

Race (Check all that apply)*

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

Non-Cash Benefits (Check all that apply)*

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

Save Changes Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-17A: Client Edit screen

- On the 'Client Edit' screen, all fields will be in **edit mode** for information to be corrected or changed. Certain drop-down boxes contain information that was entered for the other HH members. If this information is correct, it can be chosen or the information can be manually added (reference figure 3-17A).

If the phone number needs to be updated, dashes *do not* need to be typed in. As the tab button is used to exit a cell, OPUS will automatically insert the dashes, (reference figure 3-17A).

When the information has been verified and correct, click the 'Save Changes' button at the bottom of the screen (reference figure 3-17B). The 'Client View' screen will appear with the most current changes.

The screenshot shows the 'Client Edit' interface for a client named MONTGOMERY SCOTT. The form includes fields for Title, First Name (MONTGOMERY), Last Name (SCOTT), Middle, Suffix, DOB (05-11-1962), SSN/Sys# (SMONTGO05116), and SSN Verification (YES). There are also checkboxes for various benefits under the 'Non-Cash Benefits' section, such as SNAP, WIC, TANF Trans, Other Health Ins, Oregon Health Plan, VA Med Serv, Other TANF, Other Source, MEDICARE, TANF Child Care, Public Rental Assist, and Temp Rental Assist. Radio buttons are present for 'None', 'Don't Know', and 'Refused'. A 'Save Changes' button is circled in red at the bottom right. The interface also features a navigation menu, a search sidebar, and a footer with 'Oregon Housing and Community Services ©' and 'Data Classification: 3'.

Figure 3-17B: Client Edit 'Save Changes'

Household Non-Cash Benefits Update

Setup:

On the 'Household View' Screen.

1. Click the 'NCB Update' link on the 'Left Nav Bar' under Household reference (*reference figure 3-18A*).

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

Agency: OHCS
Client: MONTGOMERY SCOTT
Residence: ENTERPRISE, OR 97828
User: TESTUSER
Timeout: 19:35
Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Household View

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

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SJEANLU051125	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	SMONTGO051162	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	N
<input type="checkbox"/>	SCAROLE051162	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	123-45-6798	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	SDAVID060280	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y
<input type="checkbox"/>	SLEONAR010100	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

To Remove Household: Click this button

Remove Client(s) from Household

Move Entire Household to Unknown

Figure 3-18A: 'Household View' Screen

2. The 'Household Non-Cash Benefits Update' screen will appear. From this screen you can update non-cash benefits by individual or by entire household.
 - A. To make changes to a single individual select or deselect the NCB's that the client is currently receiving and select 'Save Changed' button for the client you are updating. (*reference figure 3-18B*).
 - B. To make changes to the entire household choose a member of the household select or deselect non-cash benefits household is receiving and select 'Apply to Household' button (*reference figure 3-18B*). **Warning: This will override any previously entered NCB's for individuals.** (*reference figure 3-18C*)



Agency: OHCS
 Client: MONTGOMERY SCOTT
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 18:59
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

Household Non-Cash Benefits Update

MONTGOMERY SCOTT

Non-Cash Benefits (Check all that apply)*

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

[Save Changes](#) [Apply to Household](#)

LEONARD MCCOY III

Non-Cash Benefits (Check all that apply)*

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

[Save Changes](#) [Apply to Household](#)

MR JAMES THOMAS KIRK

Non-Cash Benefits (Check all that apply)*

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

[Save Changes](#) [Apply to Household](#)

CAROLE MARCUS

Non-Cash Benefits (Check all that apply)*

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

[Save Changes](#) [Apply to Household](#)

DR DAVID MARCUS

Non-Cash Benefits (Check all that apply)*

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

[Save Changes](#) [Apply to Household](#)

JEAN-LUC PICARD

Non-Cash Benefits (Check all that apply)*

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

[Save Changes](#) [Apply to Household](#)

[Save All Changes](#)

Data Classification: 3

Figure 3-18B: 'Household Non-Cash Benefits Update' Screen

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

Client

Search
View
New
Edit

Residence

View
New
Edit

Household

View
Mail/Ph Update
NCB Update

Move

Client to HH
HH to Residence
Merge HH

Energy Education

View
Kit Component New

Household Non-Cash Benefits Update

MONTGOMERY SCOTT

Non-Cash Benefits (Check all that apply)*

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

Save Changes

Apply to Household

LEONARD MCCOY III

Non-Cash Benefits (Check all that apply)*

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

Save Changes

Apply to Household

MR JAMES THOMAS KIRK

Non-Cash Benefits (Check all that apply)*

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

Save Changes

Apply to Household

CAROLE MARCUS

Non-Cash Benefits (Check all that apply)*

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

Save Changes

Apply to Household

DR DAVID MARCUS

Non-Cash Benefits (Check all that apply)*

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

Save Changes

Apply to Household

JEAN-LUC PICARD

Non-Cash Benefits (Check all that apply)*

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

Save Changes

Apply to Household

Save All Changes

Data Classification: 3

Figure 3-18C: 'Household Non-Cash Benefits Update' Screen – After changes

Income Edit/Employer or Delete Income/Employer

Setup:

1. On the 'Client View' screen, use "Select Another Client in HH" to select the required HH member whose information requires to be updated. The 'Client View' screen will appear next (reference figure 3-19).

Agency: OHCS User: TESTUSER
 Client: MONTGOMERY SCOTT Timeout: 19:36
 Residence: ENTERPRISE, OR 97828 Log Out

Client Program Hist Management Reports Help

Client View Version 3.1.7T

Select Another Client in HH: **MONTGOMERY SCOTT** Go

Client Information

Name: MONTGOMERY SCOTT SSN/SYS ID# SMONTG0051162
 DOB: 05-11-1962 Age: 53
 SSN Verification: YES
 Comments:

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

Mailing Address

ADDRESS UNKNOWN
 ENTERPRISE, OR 97828 County WALLOWA

Client Characteristics

Gender: MALE Disability: NO
 Ethnicity: NON-HISPANIC/NON-LATINO Veteran: YES
 Education: UNKNOWN Language: ENGLISH
 Homebound: NO Race: SINGLE
 Oregon Tribe:
 Edit Client View Household

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
--------	--------	------	--------	------	-----------------

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

Does this client have any income? YES Save

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
UNEMPLOYMENT	STATE OF OREGON	\$8.33	\$99.96	06-30-2015	N	N
New Income Total		\$8.33	\$99.96			

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-19: Client View Edit income/employer

- To edit income or an employer, click the link for the type of income on the 'Client View' screen. The 'Income & Employer Edit' screen will appear. Some cells require manual input and some cells have drop-down boxes to choose information from. Make appropriate changes or updates as needed. Click the 'Save' button (*reference figure 3-20*). The 'Client View' screen will re-appear. **Note:** *Fields marked with * are required for an income source to be saved.*
- If a new income needs to be added, click the 'New Income' button. **Note:** Complete all required information using the same steps used to edit client information. Click the 'Save' button when complete (*reference figure 3-20*).

OPUS
Weatherization

Agency: OHCS
Client: MONTGOMERY SCOTT
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:33
Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Income/Employer Edit

Income (Fields marked with * are required.)

Source: STATE OF OREGON
 Type: UNEMPLOYMENT*
 Amount: 250.00* Frequency: Monthly*
 Verified How: Check Pay Stub* Verified By: BF* Verified Date: 06-30-2015 (mm-dd-yyyy)*

Comments
 2000 characters left (spaces count)

Employer Information

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

Delete Save

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-20: Income & Employer Edit screen

- To delete an income, click on the 'Delete' button. A "Windows Internet Explorer" confirmation will appear with the question "Are you sure you want to delete the selected income?" If the income is to be deleted, click the 'OK' button. If the income *is not* to be deleted, click 'Cancel' (reference figure 3-21, deleting income).

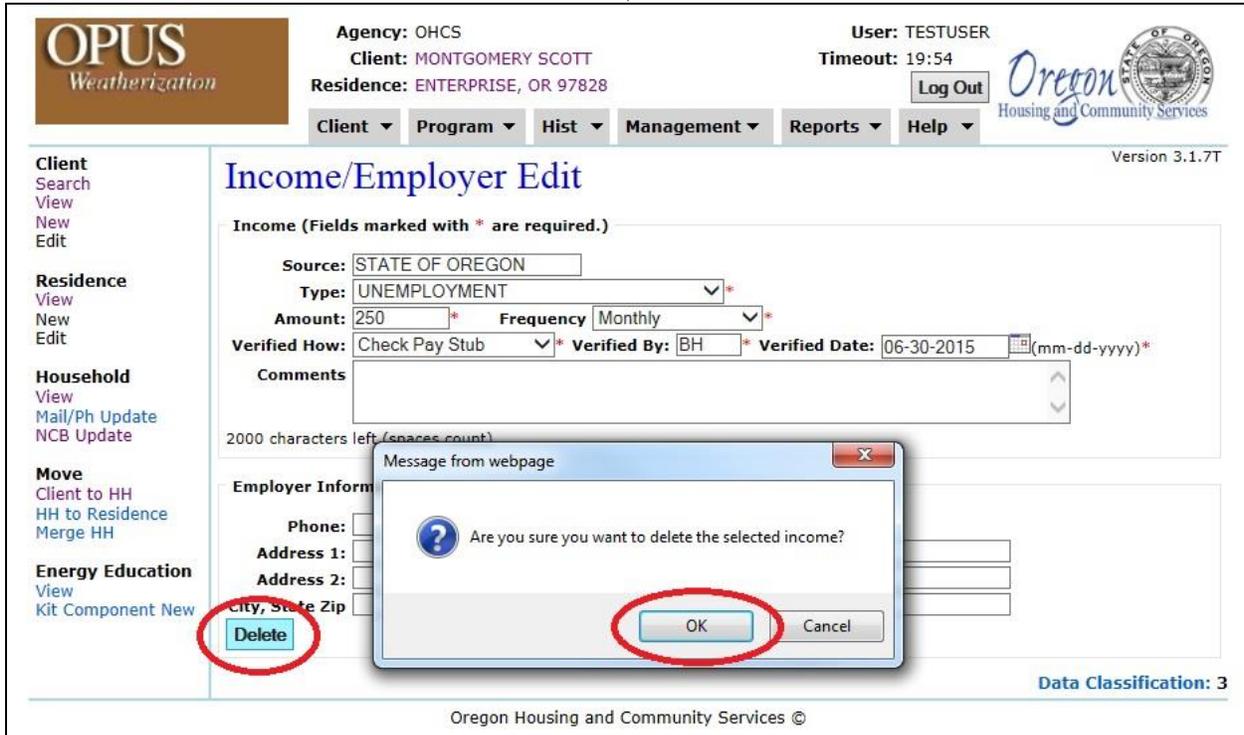


Figure 3-21: Income & Employer delete

Moves

There are six different ways to process moves in OPUS:

1. Move Client(s)/Household to Unknown
2. Move Client (s) to Household
3. Move/Adding Client(s) to Existing Residence
4. Move Household to New Residence
5. Move Household to Existing Residence
6. Merge Household with another Household

The following examples demonstrate move scenarios.

Move Client(s)/Household to Unknown

Jean-Luc Picard submitted his application for assistance. Searching the database using the client's SSN, Jean-Luc Picard was not in the database. A search for the client's current address: 1701 Federation Way, Enterprise, OR 97828 was completed and found the address in the database with a different client identified as Lisa and Steven Adams.

Setup:

1. On the 'Client Search' screen, enter James Kirk's address and click the 'Search' button. The 'Search Results' indicates James Kirk, David Marcus and Carole Marcus affiliated with the address. Click on James's SSN to get to the 'Household View' screen (*reference figure 3-22*).


Agency: OHCS **User:** TESTUSER
Timeout: 19:58
[Log Out](#)


[Client](#) ▾ [Program](#) ▾ [Hist](#) ▾ [Management](#) ▾ [Reports](#) ▾ [Help](#) ▾

Version 3.1.7T

Client Search

Search Parameters (at least one field required)

SSN/SYSID Address Unit (ie Apt B)
 First Name City
 Last Name Zip

Show Residence Info. only Show Residences With Jobs only

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

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
***-**-6798	JAMES THOMAS	KIRK	1963	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	CAROLE	MARCUS	1962	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	DAVID	MARCUS	1980	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	LEONARD	MCCOY	2000	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	JEAN-LUC	PICARD	1925	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	MONTGOMERY	SCOTT	1962	1701 FEDERATION WAY	STE 10F	ENTERPRISE
				1701 FEDERATION WAY	STE 10F	ENTERPRISE

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-22: Client Search by address

- This HH needs to be moved from the existing address which is being occupied by James Kirk. To move the family from the residence, click on 'Move Entire Household to Unknown' (reference figure 3-23).

OPUS Weatherization
 Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 19:45
 Residence: ENTERPRISE, OR 97828 **Log Out**
 Oregon Housing and Community Services

Client Program Hist Management Reports Help

Version 3.1.7T

Household View

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

Members											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>		JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>		MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>		CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>		MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>		DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>		LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family
Household Subsidized	<input type="checkbox"/>

Make any changes?

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

HH Comments

This is the hh coments section which allows a total of 2000 characters

1929 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-23: HH view. Move Entire Household to Unknown.

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

- To remove individual client(s) from HH select the clients corresponding radio button (reference figure 3-23). and click on ‘Remove Client(s) from Household’ button (reference figure 3-23).

- The database will require the user to confirm they want to move the HH to unknown. Click the 'OK' button to complete the move to unknown. When the HH has been moved out of the residence, the HH address will appear as 'unknown' (reference figure 3-24).

Agency: OHCS
User: TESTUSER
Client: MR JAMES THOMAS KIRK
Timeout: 19:45
Residence: ENTERPRISE, OR 97828
 Log Out
 Oregon Housing and Community Services
 Version 3.1.7T

Client
 Search
 View
 New
 Edit

Residence
 View
 New
 Edit

Household
 View
 Mail/Ph Update
 NCB Update

Move
 Client to HH
 HH to Residence
 Merge HH

Energy Education
 View
 Kit Component New

Household View

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

HH Members											
Bold Red elements indicate poor data quality											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	[REDACTED]						H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	[REDACTED]						NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	[REDACTED]						RF	RF	Y	N

Message from webpage
 Are you sure you want to Move Entire Household to Unknown?
 OK Cancel

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family *
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments
 This is the hh coments section which allows a total of 2000 characters
 1929 characters left (spaces count)

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-24: HH View. Move HH to unknown. Address shows 'unknown'.

Move Client to Household

1. To move a new client to a household, use 'Client Search New. Enter the required client information and click on 'Search' button (reference figure 3-25A). Click on the SSN# link for the corresponding client (reference figure 3-25A).

Agency: OHCS User: TESTUSER Timeout: 19:33 Log Out Oregon Housing and Community Services

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾ Version 3.1.7T

Client Search New

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

First Name: MONTGOMERY* DOB: 05-11-1962 (mm-dd-yyyy)*
Last Name: SCOTT* Create ID
SSN/Sys#: SMONTGO051162* Search

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

Possible Pre-Existing Client Matches

SSN #	First Name	Last Name	DOB
SMONTGO051162	MONTGOMERY	SCOTT	05-11-1962

Add New Member

Data Classification: 3

OPUS Weatherization

Client Search New
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Oregon Housing and Community Services ©

Figure 3-25A: Client Search New

- The 'Client View' Screen will appear. Click on the 'Client to HH' link on the left nav bar under 'Move' (reference figure 3-25B).

OPUS Weatherization Agency: OHCS Client: MONTGOMERY SCOTT User: TESTUSER Timeout: 19:54 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Client View Version 3.1.7T

Select Another Client in HH

Client Information

Name: MONTGOMERY SCOTT SSN/SYS ID#: SMONTGO051162
 DOB: 05-11-1962 Age: 53
 SSN Verification: YES
 Comments:

Phone: 800-555-9422 Type: HOME
 Phone: * Ext: Type: CELL

Mailing Address

PO BOX 21
 BANDON, OR 97411 County COOS

Client Characteristics

Gender: MALE Disability: **REFUSED**
 Ethnicity: **REFUSED** Veteran: YES
 Education: **UNKNOWN** Language: **UNKNOWN**
 Homebound: **UNKNOWN** Race: **REFUSED**
 Oregon Tribe:

Non-Cash Benefits

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date

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

Does this client have any income?

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-25B: Client View

You should now be at the 'Move Client' Screen. Enter the Clients FROM information and the TO household information and click the Search Button (reference figure 3-26A).

OPUS Weatherization Agency: OHCS Client: MONTGOMERY SCOTT User: TESTUSER Timeout: 18:43

Client Program Hist Management Reports Help

Move Client

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

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

Client(s) FROM - Enter at least one TO Household - Enter at least one

Please fill out at least 1 of these Client Search fields.

SSN1 [] SSN []
SSN2 [] First JEAN-LUC
SSN3 [] Last PICARD
First MONTGOMERY
Last SCOTT

Search

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-26A: Move Client

3. Select the radio button corresponding to the client to be moved and then select the corresponding radio button for the client household to be moved to. The click the 'Move Client(s) to Household' button (reference figure 3-26B).

OPUS Weatherization Agency: OHCS Client: MONTGOMERY SCOTT User: TESTUSER Timeout: 18:19

Client Program Hist Management Reports Help

Move Client

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

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

Client(s) FROM - Enter at least one TO Household - Enter at least one

SSN1 [] SSN []
SSN2 [] First JEAN-LUC
SSN3 [] Last PICARD
First MONTGOMERY
Last SCOTT

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

M	SSN	First	Last	M	SSN	First	Last
<input checked="" type="radio"/>	MONTG0051162	MONTGOMERY	SCOTT	<input type="radio"/>	DEANLU051125	DEAN-LUC	PICARD

Move Client(s) to Household
(Household view screen will appear next)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-26B: Move Client

- The database will require the user to confirm they want to move the selected client(s). Click the 'OK' button to complete the move (*reference figure 3-26C.*) The client(s) have been moved to the new HH, the 'Household View' screen will appear reflecting the new household configuration (*reference figure 3-26D.*)

The screenshot shows the OPUS Weatherization software interface. At the top, the agency is identified as OHCS and the client as MONTGOMERY SCOTT. The user is TESTUSER and the timeout is 16:55. A navigation menu includes Client, Program, Hist, Management, Reports, and Help. The main content area is titled 'Move Client' and contains instructions for moving clients to a different household. A table below the instructions shows client information, with the 'M' column checked for client SMONTGO051162. A modal dialog box titled 'Message from webpage' is overlaid on the screen, asking 'Are you sure you want to move the selected clients?' with 'OK' and 'Cancel' buttons. The 'OK' button is circled in red. The footer of the page includes 'Oregon Housing and Community Services ©' and 'Data Classification: 3'.

Figure 3-26C: Client Move - Verification

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

Household View

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

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	MONTGOMERY SCOTT	53	M	DK	Y	RF	RF	RF	N	N
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y
<input type="checkbox"/>	[REDACTED]	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Household Summary

Total Income	\$1,200.00
% of Poverty	4%
% of OMI	1%
Total # of Persons	6
HH Type	Extended Family *
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments

This is the hh coments section which allows a total of 2000 characters,

1929 characters left (spaces count)

Data Classification: 3

Figure 3-26D: Household View - Move Completed

Moving-Adding Existing Client(s) to Existing Residence

- To move an existing client to an existing residence, locate the designated client who is being moved (reference figure 3-27) and Click on SSN link open up 'Household View' (reference figure 3-27A). Click on 'HH to Residence' link in the 'Left Nav Bar'. The 'Move Household to Residence' screen will appear (reference figure 3-27B).

Agency: OHCS User: TESTUSER Timeout: 19:54

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address [] Unit [] (ie Apt B)

First Name JEAN-LUC City []

Last Name PICARD Zip []

Show Residence Info. only Show Residences With Jobs only

When you Click in Search Results: Search

Client's SSN = Household Screen Advanced Search

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

SSN #	First Name	Last Name	Birth Year	Address	Unit	City
SJEANLU051125	JEAN-LUC	PICARD	1925			

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-27: Move existing client search

Agency: OHCS Client: JEAN-LUC PICARD User: TESTUSER Timeout: 19:09

Household View

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

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

To Remove Household: Click this button

Remove Client(s) from Household

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828

Income Summary

Client Name	Income
MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Figure 3-27A: Move existing client to existing residence

OPUS
Weatherization

Agency: OHCS
Client: JEAN-LUC PICARD

User: TESTUSER
Timeout: 19:24
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Move Household to Residence

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

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

FROM Household		TO Residence	
SSN	<input type="text"/> e.g. 000-00-0000	Address	<input type="text"/> 01 FEDERATION WAY # <input type="text"/>
First	<input type="text"/> JEAN-LUC e.g. John	City	<input type="text"/> ENTERPRISE
Last	<input type="text"/> PICARD x e.g. Smith	Zip	<input type="text"/> 97828

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-27B: Move Household to Residence

Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Residence' information, click 'Search' (reference figure 3-27B).

2. The client(s) to be moved 'FROM Household' and the 'TO Residence' information will appear. Check the appropriate box(es) to complete the move. Click on 'Move Client(s) to Household' button (reference figure 3-28). Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected household?'

Agency: OHCS
Client: JEAN-LUC PICARD
User: TESTUSER
Timeout: 19:25

OPUS Weatherization
Oregon Housing and Community Services
Version 3.1.7T

Move Household to Residence

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

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

FROM Household

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

TO Residence

Address #
City
Zip

Select ONLY one HH, under the M column.			Select ONLY one Residence, under the M column.		
M	SSN	First	Last	M	Address
<input checked="" type="radio"/>	[REDACTED]	JEAN-LUC	PICARD	<input checked="" type="radio"/>	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

(Household View Screen will appear next)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-28: Move Household to Residence

- Click 'OK' if the client(s) are correct to complete the move (reference figure 3-28A).

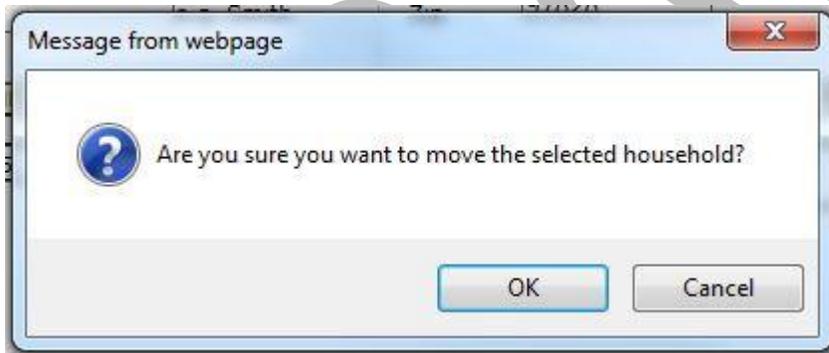


Figure 3-28A: Confirmation to move to HH to Residence

- The 'Household View' screen will appear with the client moved (reference figure 3-28B).

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

Household View

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

HH Me		Bold Red elements indicate poor data quality									
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Address

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

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family ▾*
Household Subsidized	<input type="checkbox"/>

Make any changes? **Save Changes**

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Data Classification: 3

Move Household to New Residence

Create New Residence

Searching to ensure that the residence does not already exist in OPUS is critical to this process. Duplicate residences can cause errors in reporting and calculations.

Setup:

While in the 'Client Search' screen.

1. In the address box, type a street number and street name (with spaces between as needed). If a street number isn't available, use a "%" in front of the street name, such as % Stevens St.
2. If there is an apartment or unit number, use one of these formats: Apt #, Unit #, or Spc #.
3. Type a city and zip code to narrow the results to this region of the state.
4. Select 'Search' Button. (reference Figure 3-29A).

The screenshot displays the OPUS Weatherization Client Search interface. At the top, it shows the agency as OHCS, the user as TESTUSER, and a timeout of 19:54. There are navigation menus for Client, Program, Hist, Management, Reports, and Help. The main content area is titled 'Client Search' and includes search parameters for SSN/SYSID, Address (%STARBASE), Unit, First Name, City (ENTERPRISE), Last Name, and Zip (97828). A 'Search' button is circled in red. Below the search parameters, there are checkboxes for 'Show Residence Info. only' and 'Show Residences With Jobs only'. The search results section shows 'No Results Found' circled in red. The left navigation bar has 'Residence' circled in red.

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

Figure 3-29A: Residence Search

5. If the search results displays a match. **STOP YOU CAN NOT USE THIS PROCESS.** Goto to beginning of **Moves Section** to determine correct type of move process to utilize.

6. If the residence is not in the result list, you'll see 'No Results Found'. A new household and new residence can be created. Click the 'New' link under 'Residence' on the 'Left Nav Bar' (reference Figure 3-29A).

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 18:47 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.1.7T

Residence New

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

No.	Direction	Street Name	Type	Direction	Unit	#
333	STARBASE		CT	SLIP	9	

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

Residence Info
 Residence Type: MFD/Mobile Residence Status: Rent (Heat not)
 Primary Energy Source: ELECTRIC

Save

Data Classification: 2
 Oregon Housing and Community Services ©

Figure 3-29B: 'Residence New' Screen

7. Enter the residence information. Item marked by * are required entries. Select 'Save' to add the new residence to OPUS.
8. From the Household View Screen click the 'HH to Residence' link under 'Move' on the 'Left Nav Bar' (reference Figure 3-29C).

OPUS Weatherization Agency: OHCS Residence: ENTERPRISE, OR 97828 User: TESTUSER Timeout: 19:54 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.1.7T

Residence View

Physical Address
 333 STARBASE CT SLIP 9
 ENTERPRISE, OR 97828

Residence Info
 Status: Subsidized Rent(Heat not) Type: MFD/Mobile
 Primary Energy Source: ELECTRIC County: WALLOWA

Edit Residence

Jobs

Agency	Number	Type	Status	Cost	Completion Date
New Job					

Data Classification: 2
 Oregon Housing and Community Services ©

Figure 3-29B-1: 'Residence View' Screen



Agency: OHCS
 Client: CAROLE MARCUS
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:46
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

Household View

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	██████████	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

New Client

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

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

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

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

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family ▾*
Household Subsidized	<input type="checkbox"/>

Make any changes? [Save Changes](#)

HH Comments

This is the hh coments section which allows a total of 2000 characters

1929 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-29C: Household View screen

Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Residence' information, click 'Search' (reference Figure 3-29D).

- The HH to be moved 'FROM Household' and the 'TO Residence' information will appear. Check the appropriate box(es) to complete the move. Click on 'Move Household to Residence' button (reference Figure 3-29D). Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected household?' (reference Figure 3-29E).

OPUS Weatherization Agency: OHCS Client: CAROLE MARCUS User: TESTUSER
Residence: ENTERPRISE, OR 97828 Timeout: 19:56 Log Out
Client Program Hist Management Reports Help Oregon Housing and Community Services
Version 3.1.7T

Move Household to Residence

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

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

FROM Household				TO Residence	
SSN	[] e.g. 000-00-0000			Address	%STARBASE # []
First	CAROLE	e.g. John		City	ENTERPRISE
Last	MARCUS	e.g. Smith		Zip	97828

Search

Select ONLY one HH, under the M column.				Select ONLY one Residence, under the M column.	
M	SSN	First	Last	M	Address
<input checked="" type="radio"/>	CAROLE051162	CAROLE	MARCUS	<input checked="" type="radio"/>	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

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

Data Classification: 3
Oregon Housing and Community Services ©

Figure 3-29D: 'Move Household to Residence' screen

OPUS Weatherization Agency: OHCS Client: CAROLE MARCUS User: TESTUSER
Residence: ENTERPRISE, OR 97828 Timeout: 19:56 Log Out
Client Program Hist Management Reports Help Oregon Housing and Community Services
Version 3.1.7T

Move Household to Residence

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

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

FROM Household				TO Residence	
SSN	[] e.g. 000-00-0000			Address	%STARBASE # []
First	CAROLE	e.g. John		City	ENTERPRISE
Last	MARCUS	e.g. Smith		Zip	97828

Search

Select ONLY one HH, under the M column.				Select ONLY one Residence, under the M column.	
M	SSN	First	Last	M	Address
<input checked="" type="radio"/>	CAROLE051162	CAROLE	MARCUS	<input checked="" type="radio"/>	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Message from webpage

Are you sure you want to move the selected household?

OK Cancel

Data Classification: 3
Oregon Housing and Community Services ©

Figure 3-29E: Confirmation to move to HH to Residence

10. The 'Household View' screen will appear with the household moved to the new residence (reference Figure 3-29F).



Agency: OHCS
 Client: CAROLE MARCUS
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:38



Client

Client
 Search
 View
 New
 Edit

Residence
 View
 New
 Edit

Household
 View
 Mail/Ph Update
 NCB Update

Move
 Client to HH
 HH to Residence
 Merge HH

Energy Education
 View
 Kit Component New

Household View

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

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	██████████	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	██████████	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
P	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family <input checked="" type="checkbox"/>
Household Subsidized	<input type="checkbox"/>

Make any changes?

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-29F: 'Household View' screen after move to New Residence.

Move Household to Existing Residence

1. From the Household View Screen click the 'HH to Residence' link under 'Move' on the 'Left Nav Bar' (referene figure 3-30A).

OPUS Weatherization Agency: OHCS User: TESTUSER
 Client: CAROLE MARCUS Timeout: 19:46
 Residence: ENTERPRISE, OR 97828 Log Out
 Oregon Housing and Community Services

Client Program Hist Management Reports Help

Version 3.1.7T

Household View

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

HH Members											
Bold Red elements indicate poor data quality											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

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

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments
 This is the hh coments section which allows a total of 2000 characters
 1929 characters left (spaces count)

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-30A: Household View' screen

2. Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Residence' information, click 'Search' (reference figure 3-30B).
3. The HH to be moved 'FROM Household' and the 'TO Residence' information will appear. Check the appropriate box(es) to complete the move. Click on 'Move Household to Household' button (reference figure 3-30B). Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected household?' (reference figure 3-30C).

OPUS Weatherization
 Agency: OHCS
 Client: CAROLE MARCUS
 Residence: ENTERPRISE, OR 97828
 User: TESTUSER
 Timeout: 19:56
 Log Out

Client Program Hist Management Reports Help

Move Household to Residence

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

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

FROM Household			TO Residence	
SSN	[] e.g. 000-00-0000		Address	%STARBASE # []
First	CAROLE e.g. John		City	ENTERPRISE
Last	MARCUS e.g. Smith		Zip	97828

Search

Select ONLY one HH, under the M column.			Select ONLY one Residence, under the M column.		
M	SSN	First	Last	M	Address
<input checked="" type="radio"/>	SCAROLE051162	CAROLE	MARCUS	<input checked="" type="radio"/>	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Move Household to Residence
 (Household View Search will appear next)

Data Classification: 3

Figure 3-30B: 'Move Household to Residence' screen

OPUS Weatherization
 Agency: OHCS
 Client: CAROLE MARCUS
 Residence: ENTERPRISE, OR 97828
 User: TESTUSER
 Timeout: 19:56
 Log Out

Client Program Hist Management Reports Help

Move Household to Residence

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

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

FROM Household			TO Residence	
SSN	[] e.g. 000-00-0000		Address	%STARBASE # []
First	CAROLE e.g. John		City	ENTERPRISE
Last	MARCUS e.g. Smith		Zip	97828

Search

Select ONLY one HH, under the M column.			Select ONLY one Residence, under the M column.		
M	SSN	First	Last	M	Address
<input checked="" type="radio"/>	SCAROLE051162	CAROLE	MARCUS	<input checked="" type="radio"/>	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Message from webpage

Are you sure you want to move the selected household?

OK Cancel

Data Classification: 3

Figure 3-30C: Confirmation to move to HH to Residence

10. The 'Household View' screen will appear with the household moved to the new residence (*reference figure 3-30D*).

DRAFT

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

Household View

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

HH Members										Bold Red elements indicate poor data quality		
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	██████████	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
P	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family ▾*
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Data Classification: 3

Figure 3-30D: 'Household View' screen after move to New Residence.

Merge Household with Another Household

1. In 'Household View' locate the household you want to merge with another household. On the Left Nav Bar, click 'Merge HH' link (*reference figure 3-31*).



Agency: OHCS
Client: CAROLE MARCUS
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:38
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

Household View

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

HH	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	██████████	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	██████████	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

To Remove Household: Click this button

[Remove Client\(s\) from Household](#)
[Move Entire Household to Unknown](#)

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
P	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family ▾*
Household Subsidized	<input type="checkbox"/>

Make any changes? [Save Changes](#)

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-31: HH View after merge.

- #1, fill in the 'Move FROM' 'Merge TO' then: #2, click "Search". Check the appropriate circle(s) to be updated, #3, click 'Merge Households'. "Windows Internet Explorer" will request confirmation 'Are you sure you want to Update Household information?' #4, click 'OK'. The clients in the from HH will be updated at the same time.

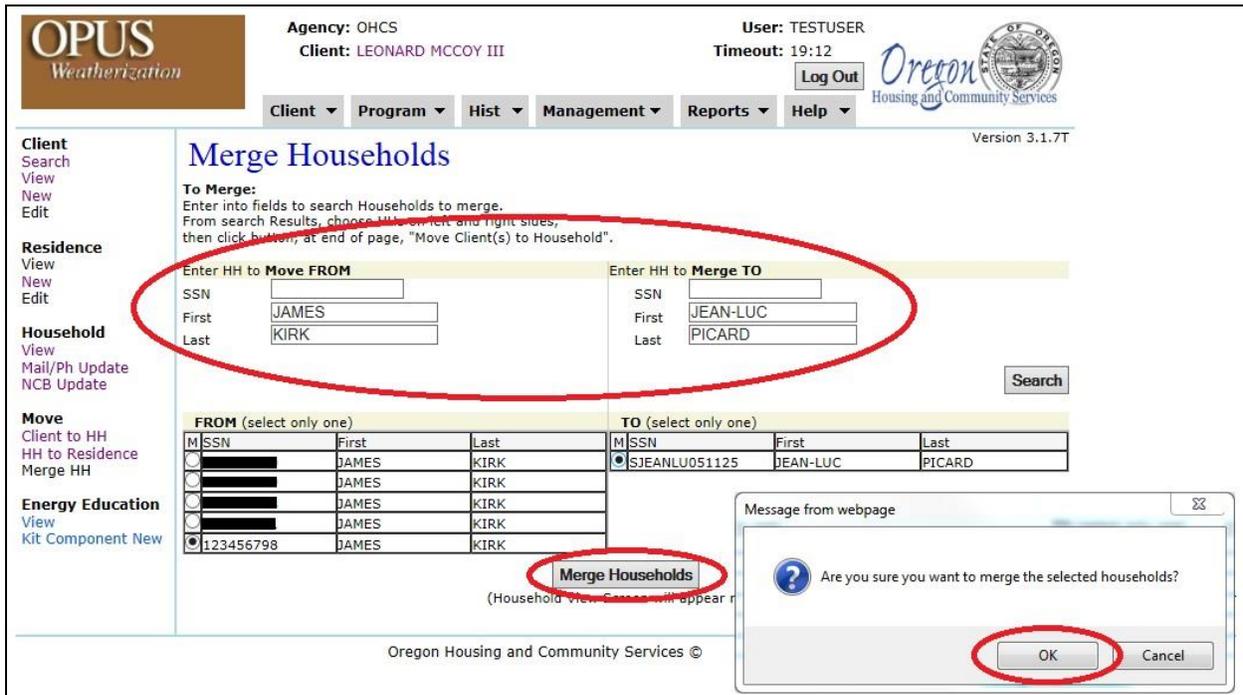


Figure 3-31A: HH View processing merge.

- The Household View screen appears. The merge is completed (reference figure 3-31B).

You will now notice that you have different addresses listed and these addresses have type codes (reference figure 3-31B). These codes are as follows:

M – Mailing Address: You may see multiples of this, if members within the household have different mailing address. Mailing Address and Physical address may differ.

P – Physical Address: This is the actual location/residential addresses were the household lives (this should not be a P.O. Box). Only one of these code types should be shown. NOTE: If the code "P" is not present and code "B" is also not present, then the HH is not associated with a physical address.

B – Both: This means that the Mailing Address and the Physical Address for at least one member of the household is the same. Only one of these code types should be shown.

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Household View

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

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SJEANLU051125	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	SMONTGO051162	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	SCAROLE051162	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	123-45-6798	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	SDAVID060280	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>	SLEONAR010100	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	ADDRESS UNKNOWN ENTERPRISE, OR 97828
P	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family <input type="checkbox"/> *
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments

This is the hh coments section which allows a total of 2000 characters

1929 characters left (spaces count)

Data Classification: 3

Figure 3-31B: HH merge completed.

4. Update mailing address for Household (reference figure 3-32).

In 'Household View', in the Left Nav Bar, #1, click 'Mail/Ph Update' link. Selected the appropriate mailing address from the dropdown #2, then #3, click 'Update Mailing Changes'. "Windows Internet Explorer" will request confirmation 'Are you sure you want to Update Household information? Click #4, 'OK'. The clients in the HH will be updated at the same time with the same address (reference figure 3-32).



Figure 3-32: Update Household Mailing

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

Household View

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

HH Members										Bold Red elements indicate poor data quality		
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	██████████	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
B	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family ▾*
Household Subsidized	<input type="checkbox"/>

Make any changes? Save Changes

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Figure 3-33: Household View Screen – Updated Address

NOTE: There is a known issue concerning these codes that is currently being researched for causes. At random the system may display the code “B” code along with the code “P” (reference figure 3-34). Although this is confusing this is not a critical failure. All operations and reports still function normally. It just looks confusing. The known solution is to go back in a second time and update the mailing address again for the household



Agency: OHCS
 Client: JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 18:59
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

Household View

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

HH Members											Bold Red elements indicate poor data quality	
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	89	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	CAROLE MARCUS	52	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	██████████	JAMES THOMAS KIRK	51	M	DK	DK	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	DR DAVID MARCUS	34	M	PHD	N	N	NH	S	Y	Y	
<input type="checkbox"/>	██████████	LEONARD MCCOY III	14	M	DK	N	RF	RF	RF	Y	N	

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Address

T	Address
B	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Phones

T	Number	Client Name
C	(503) 999-9999	JAMES THOMAS KIRK
C	(800) 555-9422	JAMES THOMAS KIRK
H	(503) 999-8422	JAMES THOMAS KIRK
C	(503) 999-8422	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS

Household Summary

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

Make any changes?

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 3-34: Household View Screen – Address Type Code – Displaying Error

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Section Four

Jobs Creation

The user will learn how to create new jobs and edit existing jobs in the OPUS database in this section.

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Move Household to Vacant Residence	142
Edit Job	149
Update Job Costs	150
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Weatherization Client Report	155
Weatherization Job Report	156

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

Create/Edit Jobs

Setup:

Starting on the 'Household View' Screen.

1. Click the 'Residence View' link on the 'Left Nav Bar' or from the 'Main Menu' under 'Client' (reference figure 4-1).

OPUS Weatherization Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 19:55
 Residence: ENTERPRISE, OR 97828 Log Out
 Oregon Housing and Community Services
 Version 3.1.7T

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

Household View
 Residence View

HH Members

R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	DR DAVID MARCUS	35	M	DK	N	N	NH	S	N	Y
<input type="checkbox"/>	[REDACTED]	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

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

Remove Client(s) from Household
 Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

Client Name	Income
DR DAVID MARCUS	\$1,200.00

Household Summary

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

Make any changes? Save Changes

HH Comments
 This is the hh coments section which allows a total of 2000 characters
 1929 characters left (spaces count)

Data Classification: 3
 Oregon Housing and Community Services ©

Figure 4-1: Household View Screen

2. The “Residence View” screen will then appear (reference figure 4-2).

OPUS Weatherization Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 19:41
 Residence: ENTERPRISE, OR 97828 Log Out

Client Program Hist Management Reports Help

Residence View Version 3.1.7T

Physical Address
 1701 FEDERATION WAY STE 10F
 ENTERPRISE, OR 97828

Residence Info
 Status: Rent (Heat inc) Type: Multi-Unit (Over 4)
 Primary Energy Source: OTHER County: WALLOWA

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Client
 Search
 View
 New
 Edit

Residence
 View
 New
 Edit

Household
 View
 Mail/Ph Update
 NCB Update

Move
 Client to HH
 HH to Residence
 Merge HH

Energy Education
 View
 Kit Component New

Edit Residence

New Job

Data Classification: 2

Oregon Housing and Community Services ©

Figure 4-2: Residence View Screen

Re-Weatherized Residence Search Procedure

The following steps will allow you to search residences to determine if they have been previously weatherized.

Setup:

Starting on the 'Client Search' Screen.

1. Enter ONLY the physical address of the residence (Do not enter client information), selected the 'Show Residences with Jobs only' checkbox and select the 'Search' Button (*reference figure 4-2A*).

The screenshot shows the 'Client Search' interface. At the top left is the 'OPUS Weatherization' logo. The top right shows 'User: TESTUSER', 'Timeout: 19:22', and a 'Log Out' button. Below this is a navigation menu with 'Client', 'Program', 'Hist', 'Management', 'Reports', and 'Help'. The main content area is titled 'Client Search' and contains a 'Search Parameters (at least one field required)' section. This section has input fields for 'SSN/SYSID', 'First Name', 'Last Name', 'Address' (filled with '1701 FEDERATION WAY'), 'City' (filled with 'ENTERPRISE'), 'Zip' (filled with '97828'), and 'Unit' (with a note '(ie Apt B)'). Below the fields are two checkboxes: 'Show Residence Info. only' (checked) and 'Show Residences With Jobs only' (checked). A 'Search' button is located below the checkboxes. Underneath the search button, there are instructions: 'When you Click in Search Results: Client's SSN = Household Screen, Client's Name = Client Screen, Residence Address = Residence Screen'. A note states 'A maximum of 100 results will be returned.' The bottom right corner of the page has 'Data Classification: 3' and the footer reads 'Oregon Housing and Community Services ©'.

Figure 4-2A: Client Search Screen

2. From the search results link (*reference figure 4-2B*), determine if any of the results are a match. If there is a match, select the corresponding address link (*reference figure 4-2B*). You will then be shown the 'Residence View' screen and all jobs will be displayed for that residence in the Jobs section (*reference figure 4-3*).

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 19:41 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Version 3.1.7T

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address 1701 FEDERATION WAY Unit [] (ie Apt B)
 First Name [] City ENTERPRISE
 Last Name [] Zip 97828

Show Residence Info. only Show Residences With Jobs only

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

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
***_**-6798	JAMES THOMAS	KIRK	1963	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	CAROLE	MARCUS	1962	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	DAVID	MARCUS	1980	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	LEONARD	MCCOY	2000	1701 FEDERATION WAY	STE 10F	ENTERPRISE
██████████	JEAN-LUC	PICARD	1925	1701 FEDERATION WAY	STE 10F	ENTERPRISE
				1701 FEDERATION WAY	STE 10F	ENTERPRISE

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-2B: Client Search Screen - Results

OPUS Weatherization Agency: OHCS Client: MR JAMES THOMAS KIRK Residence: ENTERPRISE, OR 97828 User: TESTUSER Timeout: 19:41 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Version 3.1.7T

Residence View

Physical Address
 1701 FEDERATION WAY STE 10F
 ENTERPRISE, OR 97828

Residence Info
 Status: Rent (Heat inc) Type: Multi-Unit (Over 4)
 Primary Energy Source: OTHER County: WALLOWA

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Data Classification: 2

Oregon Housing and Community Services ©

Figure 4-3: Residence View Screen

[NEW Job](#)

1. Click the 'New Job' button (reference figure 4-4) and the new Job Screen will appear (reference figure 4-5A).

The screenshot displays the OPUS Weatherization software interface. At the top, the header includes the OPUS Weatherization logo, user information (User: TESTUSER, Timeout: 19:41), and a Log Out button. Below the header, there are navigation tabs for Client, Program, Hist, Management, Reports, and Help. The main content area is titled 'Residence View' and shows details for a residence at 1701 FEDERATION WAY STE 10F, ENTERPRISE, OR 97828. The residence information includes Status: Rent (Heat inc), Type: Multi-Unit (Over 4), and Primary Energy Source: OTHER. A table of jobs is shown below, with one job listed: Agency CCN, Number TEST JOB 1, Type WEATHERIZED, Status COMPLETED, Cost \$0.00, and Completion Date 10-30-2005. A 'New Job' button is circled in red in the bottom left corner of the main content area. The footer includes the Oregon Housing and Community Services logo and the text 'Oregon Housing and Community Services ©' and 'Data Classification: 2'.

Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828
User: TESTUSER
Timeout: 19:41
Log Out
Oregon Housing and Community Services
Version 3.1.7T

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Residence View

Physical Address
1701 FEDERATION WAY STE 10F
ENTERPRISE, OR 97828

Residence Info
Status: Rent (Heat inc) Type: Multi-Unit (Over 4)
Primary Energy Source: OTHER County: WALLOWA

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Edit Residence

New Job

Data Classification: 2

Oregon Housing and Community Services ©

Figure 4-4: Residence View Screen



Figure 4-5A: New Job Screen

2. Select the appropriate APC information from the drop down box and click on the “Load” button (reference figure 4-5B)

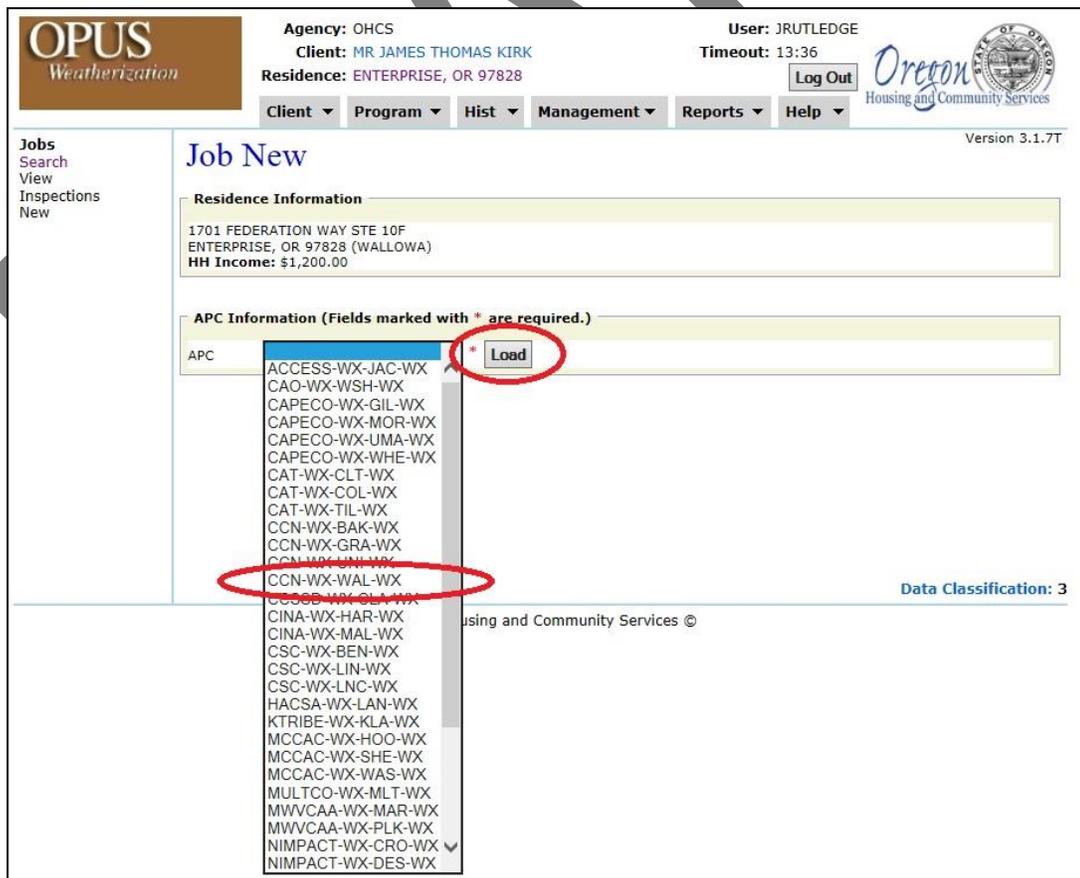


Figure 4-5B: New Job Screen – APC Information Dropdown

OPUS Weatherization Agency: OHCS User: JRUTLEDGE
 Client: MR JAMES THOMAS KIRK Timeout: 19:41
 Residence: ENTERPRISE, OR 97828 Log Out Oregon Housing and Community Services
 Client Program Hist Management Reports Help Version 3.1.7T

Job New

Residence Information
 1701 FEDERATION WAY STE 10F
 ENTERPRISE, OR 97828 (WALLOWA)
 HH Income: \$1,200.00

APC Information (Fields marked with * are required.)
 APC: CCN-WX-WAL-WX * Load

Job Information (Fields marked with * are required.)

Applicant	<input type="text"/> *	Intake Worker	EJR *
Job Number	<input type="text"/> *	MMBTUS Saved	<input type="text"/> *
Completion Date	<input type="text"/> (mm-dd-yyyy) *	Fuel Type	OTHER *
Job Status	<input type="text"/> *	Building Type	<input type="text"/> *
Year Built	<input type="text"/> * YYYY		

Weatherized Only?
 Baseload Only?
 Re-Weatherized?

No Special
 PA Exempted?
 Section 106 Completed?

Reweathered Or Job Comments
 500 characters left (spaces count)

Primary Contractor	<input type="text"/>	Agency Inspector	<input type="text"/> *
Primary Utility	<input type="text"/> *	Primary Other	<input type="text"/>
Secondary Utility	<input type="text"/> *	Secondary Other	<input type="text"/>
Tertiary Utility	<input type="text"/> *	Tertiary Other	<input type="text"/>

Save
Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-5C: New Job Screen – Job Information

3. This section will allow you to fill in weatherization specific information. Following is the definition and requirements for each field.

Applicant: Choose the household member who applied for services from the drop down list, unless the unit is vacant.

Intake Worker: The intake workers initials from the client intake will auto fill in this window. This field is to identify the person filling out the job information. The field is editable and can be changed if necessary.

Job #: Insert your job number in this field (job numbers cannot be reused within the same agency)

MMBTU's Saved: Insert the total calculated MMBTU (Million BTU) savings for the project. This field requires a number to be entered in the field. For pending jobs, enter "0". Maxium entry in this field is 60 MMBTU.

Completion Date: Enter date of completion in this field. Date can either be entered directly or the calendar icon can be used to choose the date. For pending projects, enter the approximate completion date.

Fuel Type: Choose the primary heating fuel type from the drop down list.

Job Status: Choose one of the following options

- **Completed:** Final inspection completed and all measures passed inspection.
- **Pending:** Job is in progress but not completed. Pending jobs only show in *reports* when a job cost is associated with project. Job costs may be added only if crews have started work, or contracts with contractors have been signed. Input the projected completion date of the project.
- **Void:** Use this option to void projects that have no work to be completed or work cannot proceed. Voided projects will not show up in any reports.

Building Type: Choose the appropriate category for the project:

- **Mobile Owner** – Mobile/manufactured home (the mobile is owned by the client, they do not have to own the space).
- **Mobile Renter** – Mobile/manufactured home rented by the client.
- **Multi-Family** – Any project with 5 or more units is considered multi-family in OPUS. You must include an entry for each unit in OPUS in order for the project to be counted.
- **Duplex** – Two unit building. You must include two separate entries in OPUS.
- **Tri-plex** – Three unit building. You must include three separate entries in OPUS.
- **Four-Plex** – Four unit building. You must include four separate entries in OPUS.
- **Owner Single Family** – A site build conventional home, owned by the client.
- **Renter Single Family** – A site built conventional home, rented by the client.
- **Shelter** – For the purpose of determining how many dwelling units exist in a shelter, each 800 square feet of the shelter may count as a dwelling unit or it may count each floor of the shelter as a dwelling unit. A separate entry must be input into OPUS for each dwelling unit.

Year Built: Enter the year the structure was built.

Weatherized Only: Highlight this button if the project received major weatherization measures. (This can include baseload also)

Baseload Only: Highlight this button if no major weatherization was completed (only baseload). Includes water savers, (showerheads, aerators etc.) Refrigerators, CFL's.

Re-Weatherized: Highlight this button only if the home has been previously weatherized by the low income WX program after 9/30/1994, and your program is performing additional weatherization. A comment is required if the re-weatherized box is checked. The comment must include date of previous weatherization and funding sources used.

Re-weatherized or job comments: Insert general job comments or re-weatherization comments in this field. If the Re-weatherized button is highlighted, a comment is mandatory.

No Special: Highlight this button if the project does not require or qualify for SHPO reporting.

PA Exempted: Check this box if the project was exempt and did not require the submission the 106 form under the SHPO/OHCS programmatic agreement. NOTE: Select either 'PA Exempted?' or 'Section 106 Completed' not both.

Section 106 Completed: Check this box if the project required a section 106 form to be completed and submitted to SHPO for approval. NOTE: Select either 'PA Exempted?' or 'Section 106 Completed' not both.

Primary Contractor: Enter the legal business name of the primary weatherization contractor as shown on business license. If multiple contractors are working on the job the primary contractor is the contractor who completes the largest number of the primary measures.

Primary Utility: Enter the jobs primary heating fuel. Choose the appropriate local utility from the drop down list. If not a metered utility (Oil, propane, wood etc.) choose “other” and identify the fuel and provider if known in the “Primary Other” text box to the right of the drop down list. This would be the only entry for an electrically heated home with no other heat sources.

Secondary Utility: Enter the jobs secondary utility provider from the drop down. On a job that the primary heat source is other than electric, the secondary utility will always be the electric utility. Choose “none” if the home is electrically heated with no other heat source. If the job is electrically heated and has an additional heat source that is not a metered utility, choose “other” and identify the fuel provider if known in the “secondary other” text box to the right of the drop down list.

Tertiary Utility: If the job has an additional heat source beyond the primary heat source, choose “other” and identify the fuel type and provider if known in the “Primary Other” text box to the right of the drop down list. Choose “none” if not applicable.

Agency Inspector: Make the applicable selection from the dropdown box. This field requires an entry. Initially, the “none” option can be chosen. Once the job is completed, choose the name of the QCI inspector who inspected the job. If your agency has a non-certified inspector on staff and they complete the inspection, choose the “non-QCI” option.

Primary Other: See Primary Utility

Secondary Other: See Secondary Utility

Tertiary Other: See Tertiary Utility

4. Once you have filled in all the required pertinent information click ‘Save’ button (reference figure 4-5D).

OPUS Weatherization Agency: OHCS User: JRUTLEDGE
 Client: MR JAMES THOMAS KIRK Timeout: 2:15
 Residence: ENTERPRISE, OR 97828 Log Out
 Oregon Housing and Community Services
 Client Program Hist Management Reports Help Version 3.1.7T

Job New

Residence Information
 1701 FEDERATION WAY STE 10F
 ENTERPRISE, OR 97828 (WALLOWA)
 HH Income: \$1,200.00

APC Information (Fields marked with * are required.)
 APC: CCN-WX-WAL-WX * Load

Job Information (Fields marked with * are required.)

Applicant: MR JAMES THOMAS KIRK *	Intake Worker: EJR *
Job Number: TEST JOB 3 *	MMBTUS Saved: 0.00 *
Completion Date: 07-30-2020 (mm-dd-yyyy) *	Fuel Type: ELECTRIC *
Job Status: PENDING *	Building Type: RENTER SINGLE FAMILY *
Year Built: 1950 * YYYY	

Weatherized Only?
 Baseload Only?
 Re-Weatherized? No Special
 PA Exempted?
 Section 106 Completed?

Reweatherized Or Job Comments
 Home Previously Weatherized October 2003.
 Funds utilized LIHEAP and DOE.
 428 characters left (spaces count)

Primary Contractor: UTOPIA PLANTIA SHIP YARD	Agency Inspector: NONE *
Primary Utility: PP *	Primary Other: []
Secondary Utility: OTHER *	Secondary Other: OIL
Tertiary Utility: NONE *	Tertiary Other: []

Save
 Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-5D: New Job Screen – Filled Out

You are now at the 'Job View' from this Screen you can view reports [weatherization client and Weatherization Job], Move Job, Edit Job Information, Update Jobs Costs (reference figure 4-6).

OPUS Weatherization

Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 19:16
 Residence: ENTERPRISE, OR 97828 Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Jobs
 Search
 View
 Inspections
 New

Job View

APC: CCN-WX-WAL-WX

JOB REPORTS

[WX Client](#) [WX Job](#)

Note: Click on the blue diamond to view the report definitions.

HOUSEHOLD CLIENT INCOME INFORMATION

Client Name	Age	Income
JEAN-LUC PICARD	95	\$0.00
CAROLE MARCUS	58	\$0.00
MR JAMES THOMAS KIRK	57	\$0.00
DR DAVID MARCUS	40	\$1,200.00
LEONARD MCCOY III	20	\$0.00

[Move Job](#) Click to move this job to a different or vacant Household.

RESIDENCE, APPLICANT, AND HOUSEHOLD INFORMATION

Residence Info	Applicant / Household Info
1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	Applicant Name: MR JAMES THOMAS KIRK HH Income: \$1,200.00

JOB INFORMATION

Job Number	TEST JOB 2	MMBTUS Saved	0
Completion Date	07-30-2020	Fuel Type	OTHER
Job Status	PENDING	Building Type	MOBILE OWNER
Job Type	REWEATHERIZED	Year Built	1950
H&S - ASHRAE	N	PA Exempted?	N
H&S - Other	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker	XXXX
Reweatherized Or Job Comments	Home Previously Weatherized October 2013. Funds utilized LIHEAP and DOE.		
Primary Contractor	UTOPIA PLANTIA SHIPYARD	Primary Inspector	NONE
Primary Utility	PP	Primary Other Name	
Secondary Utility	OTHER	Secondary Other Name	
Tertiary Utility	NONE	Tertiary Other Name	

[Edit Job Info](#)

JOB COSTS

Grant	Cost
	\$0.00

[Update Job Costs](#)

Job Cost Comments:

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-6: Job View Screen

MOVE JOB

1. There are two ways to move a job. The first example is from the 'Main Menu' under 'Program', 'Job Search' (*reference figure 4-7*). You can then search for the job via any of the criteria presented (*reference figure 4-8A*). Click on the appropriate job number link from the displayed search results (*reference figure 4-8B*).

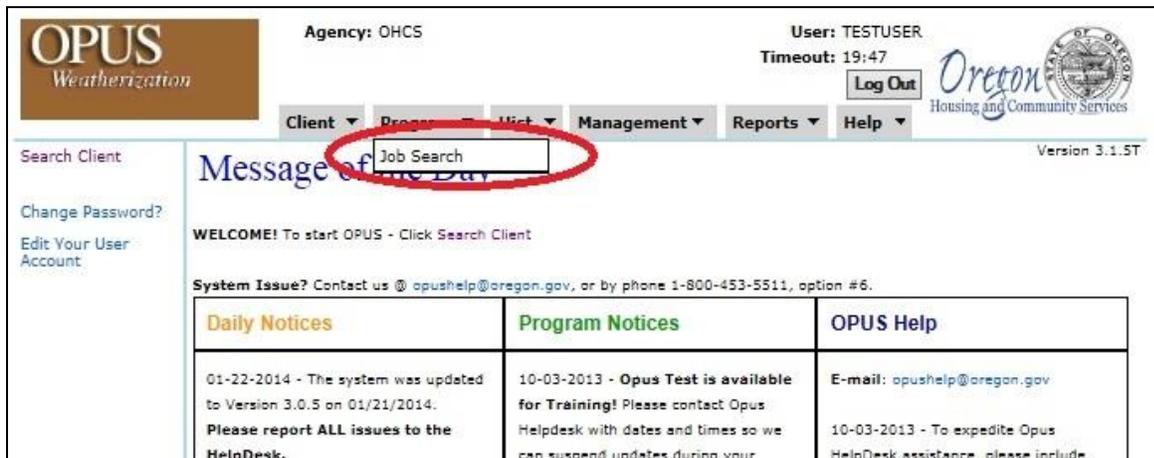


Figure 4-7: Main Menu, Program, Job Search

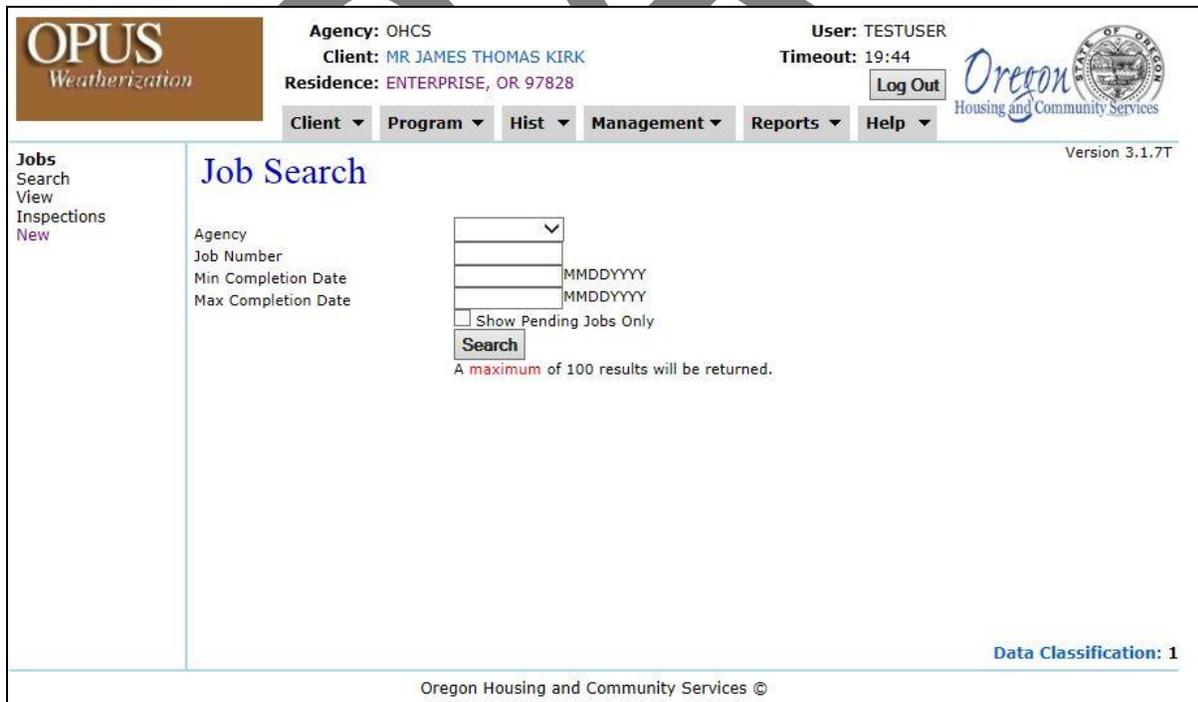


Figure 4-8A: Job Search Screen

OPUS Weatherization
 Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828
 User: TESTUSER
 Timeout: 19:55
 Log Out
 Oregon Housing and Community Services
 Version 3.1.7T

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Job Search
 Agency: [TEST JOB 2]
 Job Number: [MDDYYYYY]
 Min Completion Date: [MDDYYYYY]
 Max Completion Date: [MDDYYYYY]
 Show Pending Jobs Only

 A maximum of 100 results will be returned.

JOB SEARCH RESULTS - Click on Job Number to view Job Info.

Agency	Job Number	Completion Date	Total Job Cost	BTUS Saved	Status
CCN	TEST JOB 2	07-30-2020	\$0.00	0	PENDING

Data Classification: 1
 Oregon Housing and Community Services ©

Figure 4-8B: Job Screen – Job Number

2. The second example is from the 'Household View' screen (reference figure 4-9). Click on the Job Number link in the Jobs Section of the 'Household View' screen (reference figure 4-9). **NOTE:** This option will only work if the job already has a household associated with it.



Agency: OHCS
 Client: JEAN-LUC PICARD
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 10:46
[Log Out](#)



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Household View

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

HH Members						Bold Red elements indicate poor data quality					
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	██████████	DR DAVID MARCUS	34	M	DK	N	N	NH	S	N	Y
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$0.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Household Summary

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

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-9: Household View Screen

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- Click the 'Move Job' button (reference figure 4-10) and the 'Household to Job Move' Screen will appear (reference figure 4-11).

OPUS Weatherization Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 9:35
 Residence: ENTERPRISE, OR 97828 Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Job View

APC: CCN-WX-WAL-WX

JOB REPORTS

WX Client WX Job

Note: Click on the blue diamond to view the report definitions.

HOUSEHOLD CLIENT INCOME INFORMATION

Client Name	Age	Income
JEAN-LUC PICARD	95	\$0.00
CAROLE MARCUS	58	\$0.00
MR JAMES THOMAS KIRK	57	\$0.00
DR DAVID MARCUS	40	\$1,200.00
LEONARD MCCOY III	20	\$0.00

Move Job Click to move this job to a different or vacant Household.

RESIDENCE, APPLICANT, AND HOUSEHOLD INFORMATION

Residence Info	Applicant / Household Info
1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	Applicant Name MR JAMES THOMAS KIRK HH Income \$1,200.00

JOB INFORMATION

Job Number	TEST JOB 2	MMBTUS Saved	0
Completion Date	07-30-2020	Fuel Type	OTHER
Job Status	PENDING	Building Type	MOBILE OWNER
Job Type	REWEATHERIZED	Year Built	1950
H&S - ASHRAE	N	PA Exempted?	N
H&S - Other	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker	XXXX
Reweatherized Or Job Comments	Home Previously Weatherized October 2013. Funds utilized LIHEAP and DOE.		
Primary Contractor	UTOPIA PLANTIA SHIPYARD	Primary Inspector	NONE
Primary Utility	PP	Primary Other Name	
Secondary Utility	OTHER	Secondary Other Name	
Tertiary Utility	NONE	Tertiary Other Name	

Edit Job Info

JOB COSTS

Grant	Cost
	\$0.00

Update Job Costs

Job Cost Comments:

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-10: Job View Screen

NOTE: If Household / Residence was constructed in another module (i.e. Energy Assistance), you may need to move jobs to associate the jobs with the correct household currently occupying the the residence.

4. Select the vacant residence radio button and click the 'Move Job' button (reference figure 4-11) and the 'Job View' Screen will appear (reference figure 4-12).

OPUS Weatherization Agency: OHCS Client: JEAN-LUC PICARD User: TESTUSER
 Residence: ENTERPRISE, OR 97828 Timeout: 19:49 Log Out
 Oregon Housing and Community Services

Client Program Hist Management Reports Help

Jobs Search View Inspections New

Household To Job Move

Version 3.1.7T

Job Information

Agency: COMMUNITY CONNECTION OF NE OREGON
 Job Number: TEST JOB 1
 Completion Date: 10-30-2005
 Building Type: MOBILE OWNER
 Applicant Name: JEAN-LUC PICARD
 Address: 1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

BTUS Saved: 0
 Fuel Type: OTHER

New Applicant	Age	Native American	Disabled	Income
<input checked="" type="radio"/> Vacant Residence				

Move Job

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-11: Household to Job Move

DRAFT

OPUS Weatherization Agency: OHCS User: TESTUSER
 Residence: ENTERPRISE, OR 97828 Timeout: 15:18
 Log Out Oregon Housing and Community Services
 Client Program Hist Management Reports Help Version 3.1.7T

Job View

APC: CCN-WX-WAL-WX

JOB REPORTS

[WX Job](#)

Note: Click on the blue diamond to view the report definitions.

HOUSEHOLD CLIENT INCOME INFORMATION

Job for a vacant residence. No client found!

[Move Job](#) Click to move this job to a different or vacant Household.

RESIDENCE, APPLICANT, AND HOUSEHOLD INFORMATION

Residence Info		Applicant / Household Info	
1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828		Applicant Name	
		HH Income	\$0.00

JOB INFORMATION

Job Number	TEST JOB 2	MMBTUS Saved	0
Completion Date	07-30-2020	Fuel Type	OTHER
Job Status	PENDING	Building Type	MOBILE OWNER
Job Type	REWEATHERIZED	Year Built	1950
H&S - ASHRAE	N	PA Exempted?	N
H&S - Other	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker	XXXX
Reweatherized Or Job Comments	Home Previously Weatherized October 2013. Funds utilized LIHEAP and DOE.		
Primary Contractor	UTOPIA PLANTIA SHIPYARD	Primary Inspector	UNKNOWN
Primary Utility	UNKNOWN	Primary Other Name	
Secondary Utility	UNKNOWN	Secondary Other Name	
Tertiary Utility	UNKNOWN	Tertiary Other Name	

[Edit Job Info](#)

JOB COSTS

Grant	Cost
	\$0.00

[Update Job Costs](#)

Job Cost Comments:

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-12: Job View – Moved Completed – Vacant Residence

NOTE: Screen now shows ‘Job for a vacant residence. No client found!’ (reference figure 4-12). You will see this message if the job has no household attached.



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:49

Log Out



Client Program Hist Management Reports Help

Version 3.1.7T

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

Household View

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

HH Members											
Bold Red elements indicate poor data quality											
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	[REDACTED]	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	[REDACTED]	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	[REDACTED]	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	[REDACTED]	DR DAVID MARCUS	34	M	DK	N	N	NH	S	N	Y
<input type="checkbox"/>	[REDACTED]	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

New Client

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

Remove Client(s) from Household

To Remove Household: Click this button

Move Entire Household to Unknown

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Address

T	Address
M	PO BOX 21 BANDON, OR 97411
P	1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Household Summary

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

Make any changes? Save Changes

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-13: Household View Screen – After job moved completion

NOTE: Figure 4-13 now shows the job is no longer attached to the household.

Move Household to Vacant Residence

The following steps will allow you to move a Household currently in OPUS to a vacant residence that has jobs associated with it (*reference figure 4-14*)

OPUS Weatherization Agency: OHCS User: TESTUSER
 Residence: ENTERPRISE, OR 97828 Timeout: 15:18
 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Jobs Search View Inspections New Version 3.1.7T

Job View

APC: CCN-WX-WAL-WX

JOB REPORTS

WX Job

Note: Click on the blue diamond to view the report definitions.

HOUSEHOLD CLIENT INCOME INFORMATION

Job for a vacant residence. No client found!

Move Job Click to move this job to a different or vacant Household.

RESIDENCE, APPLICANT, AND HOUSEHOLD INFORMATION

Residence Info	Applicant / Household Info
1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	Applicant Name HH Income \$0.00

JOB INFORMATION

Job Number	TEST JOB 2	MMBTUS Saved	0
Completion Date	07-30-2020	Fuel Type	OTHER
Job Status	PENDING	Building Type	MOBILE OWNER
Job Type	REWEATHERIZED	Year Built	1950
H&S - ASHRAE	N	PA Exempted?	N
H&S - Other	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker	XXXX
Reweatherized Or Job Comments	Home Previously Weatherized October 2013. Funds utilized LIHEAP and DOE.		
Primary Contractor	UTOPIA PLANTIA SHIPYARD	Primary Inspector	UNKNOWN
Primary Utility	UNKNOWN	Primary Other Name	
Secondary Utility	UNKNOWN	Secondary Other Name	
Tertiary Utility	UNKNOWN	Tertiary Other Name	

Edit Job Info

JOB COSTS

Grant	Cost
	\$0.00

Update Job Costs

Job Cost Comments:

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-14: Job View Screen – Vacant Residence

- From the Household View screen select the 'HH to Residence' link of the Left Nav Bar (reference figure 4-15).



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

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



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

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

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

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

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

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

Household View

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

HH Members				Bold Red elements indicate poor data quality								
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	██████████	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	██████████	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	██████████	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	██████████	DR DAVID MARCUS	34	M	DK	N	N	NH	S	N	Y	
<input type="checkbox"/>	██████████	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

New Client **Remove Client(s) from Household**

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

To Remove Household: Click this button **Move Entire Household to Unknown**

Jobs

Agency	Number	Type	Status	Cost	Completion Date

Address

T	Address
M	PO BOX 21 BANDON, OR 97411

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Income Summary

DR DAVID MARCUS	\$1,200.00
-----------------	------------

Household Summary

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

Make any changes? **Save Changes**

HH Comments

2000 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-15: Household View Screen – Vacant Residence

- The 'Move Household to Residence' screen should now appear. Enter the 'FROM Household' information, the 'TO Residence' information and select the 'Search' button (reference figure 4-16A)

OPUS Weatherization Agency: OHCS Client: JEAN-LUC PICARD User: TESTUSER Timeout: 19:20 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Client Search View New Edit

Residence View New Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Move Household to Residence

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

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

FROM Household	TO Residence
SSN: 123456798 e.g. 000-00-0000	Address: 1701 FEDERATION WJ#
First: JAMES e.g. John	City: ENTERPRISE
Last: KIRK e.g. Smith	Zip: 97828

Search

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-16A: Move Household to Residence screen

- Select the button for the corresponding FROM Household and the TO Residence button. Verify you have made the correct selection if more than one is displayed and select the 'Move Household to residence' button (reference figure 4-16B).

OPUS Weatherization Agency: OHCS Client: JEAN-LUC PICARD User: TESTUSER Timeout: 19:05 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Client Search View New Edit

Residence View New Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Move Household to Residence

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

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

FROM Household	TO Residence
SSN: 123456798 e.g. 000-00-0000	Address: 1701 FEDERATION WJ#
First: JAMES e.g. John	City: ENTERPRISE
Last: KIRK e.g. Smith	Zip: 97828

Select ONLY one HH, under the M column.			Select ONLY one Residence, under the M column.	
SSN	First	Last	Address	
<input checked="" type="radio"/> 123456798	JAMES	KIRK	<input checked="" type="radio"/> 1701 FEDERATION WAY STE 10F	ENTERPRISE, OR 97828

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

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-16B: Move Household to Residence screen – with selections

- You have now moved the household into the new residence. The next step is to associate the job with the new household. From the 'Job Search' screen enter the 'Job Number' and select the 'Search' button (reference figure 4-17A). Select the corresponding job number from the resulting search list (reference figure 4-17B).

Figure 4-17A: Job Search Screen

Agency	Job Number	Completion Date	Total Job Cost	BTUS Saved	Status
CCN	TEST JOB 2	07-30-2020	\$0.00	0	PENDING

Figure 4-17B: Job Search Screen - Results

5. You should now be at the Job View Screen. Select the 'Move Job' button (reference figure 4-18).

OPUS Weatherization Agency: OHCS User: TESTUSER
 Client: MR JAMES THOMAS KIRK Timeout: 19:52
 Residence: ENTERPRISE, OR 97828 Log Out
 Oregon Housing and Community Services
 Client Program Hist Management Reports Help Version 3.1.7T

Jobs
 Search
 View
 Inspections
 New

Job View

APC: CCN-WX-WAL-WX

JOB REPORTS

WX Client WX Job

Note: Click on the blue diamond to view the report definitions.

HOUSEHOLD CLIENT INCOME INFORMATION

Client Name	Age	Income
JEAN-LUC PICARD	95	\$0.00
CAROLE MARCUS	58	\$0.00
MR JAMES THOMAS KIRK	57	\$0.00
DR DAVID MARCUS	40	\$1,200.00
LEONARD MCCOY III	20	\$0.00

Move Job Click to move this job to a different or vacant Household.

RESIDENCE, APPLICANT, AND HOUSEHOLD INFORMATION

Residence Info	Applicant / Household Info
1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	Applicant Name MR JAMES THOMAS KIRK HH Income \$1,200.00

JOB INFORMATION

Job Number	TEST JOB 2	MMBTUS Saved	0
Completion Date	07-30-2020	Fuel Type	OTHER
Job Status	PENDING	Building Type	MOBILE OWNER
Job Type	REWEATHERIZED	Year Built	1950
H&S - ASHRAE	N	PA Exempted?	N
H&S - Other	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker	XXXX
Reweatherized Or Job Comments	Home Previously Weatherized October 2013. Funds utilized LIHEAP and DOE.		
Primary Contractor	UTOPIA PLANTIA SHIPYARD	Primary Inspector	NONE
Primary Utility	PP	Primary Other Name	
Secondary Utility	OTHER	Secondary Other Name	
Tertiary Utility	NONE	Tertiary Other Name	

Edit Job Info

JOB COSTS

Grant	Cost
	\$0.00

Update Job Costs

Job Cost Comments:

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-18: Job View Screen

- You are now at the 'Household to Job Move' screen. Select the primary applicants name from the listing of available household members and select the 'Move Job' button (*reference figure 4-19*).

OPUS Weatherization Agency: OHCS User: JRUTLEDGE
 Residence: ENTERPRISE, OR 97828 Timeout: 19:17
 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help

Jobs Search View Inspections New

Household To Job Move

Version 3.1.7T

Job Information

Agency: COMMUNITY CONNECTION OF NE OREGON
 Job Number: TEST JOB 1
 Completion Date: 10-30-2005
 Building Type: MOBILE OWNER
 Applicant Name: [Redacted]
 Address: 1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828
 BTUS Saved: 0
 Fuel Type: OTHER

New Applicant	Age	Native American	Disabled	Income
<input type="radio"/> Vacant Residence				
<input type="radio"/> LEONARD MCCOY III	15	N	N	\$0.00
<input checked="" type="radio"/> MR JAMES THOMAS KIRK	52	N	N	\$0.00
<input type="radio"/> CAROLE MARCUS	53	N	N	\$0.00
<input type="radio"/> DR DAVID MARCUS	34	N	N	\$1,200.00
<input type="radio"/> JEAN-LUC PICARD	90	N	Y	\$0.00

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-19: Job View Screen

As you can now see the job is now associated with the Kirk household at their current residence (reference figure 4-20).

OPUS Weatherization Agency: OHCS User: JRUTLEDGE
 Client: MR JAMES THOMAS KIRK Timeout: 19:46
 Residence: ENTERPRISE, OR 97828 Log Out
 Oregon Housing and Community Services
 Version 3.1.7T

Job View
 APC: CCN-WX-WAL-WX

JOB REPORTS
 WX Client WX Job
 Note: Click on the blue diamond to view the report definitions.

HOUSEHOLD CLIENT INCOME INFORMATION

Client Name	Age	Income
JEAN-LUC PICARD	80	\$0.00
CAROLE MARCUS	43	\$0.00
MR JAMES THOMAS KIRK	42	\$0.00
DR DAVID MARCUS	25	\$1,200.00
LEONARD MCCOY III	5	\$0.00

Move Job Click to move this job to a different or vacant Household.

RESIDENCE, APPLICANT, AND HOUSEHOLD INFORMATION

Residence Info	Applicant / Household Info
1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	Applicant Name MR JAMES THOMAS KIRK HH Income \$1,200.00

JOB INFORMATION

Job Number	TEST JOB 1	MMBTUS Saved	0
Completion Date	10-30-2005	Fuel Type	OTHER
Job Status	COMPLETED	Building Type	MOBILE OWNER
Job Type	WEATHERIZED	Year Built	1965
H&S - ASHRAE	N	PA Exempted?	N
H&S - Other	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker	XXXX
Reweatherized Or Job Comments		Primary Inspector	UNKNOWN
Primary Contractor		Primary Other Name	
Primary Utility	UNKNOWN	Secondary Other Name	
Secondary Utility	UNKNOWN	Tertiary Other Name	
Tertiary Utility	UNKNOWN		

Edit Job Info

JOB COSTS

Grant	Cost
	\$0.00

Update Job Costs

Job Cost Comments:

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-20: Job View Screen - Updated

EDIT JOB

1. Click on the 'Edit Job Info' button (reference figure 4-7) to access the Edit Job Information Screen (reference figure 4-21).
2. Make any necessary changes and click the "Save" button.

OPUS Weatherization Agency: OHCS User: TESTUSER
Client: MR JAMES THOMAS KIRK Timeout: 17:21
Residence: ENTERPRISE, OR 97828 Log Out
Client Program Hist Management Reports Help
Version 3.1.7T

Job Edit

Residence Information
1701 FEDERATION WAY STE 10F
ENTERPRISE, OR 97828 (WALLOWA)
HH Income \$1,200.00

APC Information (Fields marked with * are required.)
APC: CCN-WX-WAL-WX * Load

Job Information (Fields marked with * are required.)

Applicant	MR JAMES THOMAS KIRK *	Intake Worker	XXXX *
Job Number	TEST JOB 2 *	MMBTUS Saved	0 *
Completion Date	07-30-2020 (mm-dd-yyyy) *	Fuel Type	OTHER *
Job Status	PENDING *	Building Type	MOBILE OWNER *
Year Built	1950 * YYYY		

Weatherized Only?
Baseload Only?
Re-Weatherized? No Special
PA Exempted?
Section 106 Completed?

Reweatherized Or Job Comments
Home Previously Weatherized October 2013.
Funds utilized LIHEAP and DOE.
500 characters left (spaces count)

Primary Contractor: UTOPIA PLANTIA SHIPYARD Agency Inspector: NONE *
Primary Utility: PP * Primary Other:
Secondary Utility: OTHER * Secondary Other:
Tertiary Utility: NONE * Tertiary Other:

Update HH Composition?

Save

Data Classification: 3

Oregon Housing and Community Services ©

Figure 4-21: Edit Job Information

3. Select 'Update HH Composition?' checkbox (reference figure 4-21) to update all household characteristics and residence information. This should only be initiated if the initial qualification is over 12 months old and or there was missing or incorrect information submitted from the initial/previous program qualification.

ADD/UPDATE JOB COSTS

1. Click on the 'Update Job Costs' button (*reference figure 4-7*) to access the Update Job Costs Screen (*reference figure 4-22*).

This section will allow you to enter job costs associated with a particular measure as well as funding sources utilized to complete the measure.

Enter funding source(s) used for each measure. Add comments for any unusual situation such as measure buy down or landlord contribution.

H&S other, H&S ASHRAE, Furnace replacement H&S, other and incidental repair require a comment be entered in the comment field.

DRAFT



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: JRUTLEDGE
 Timeout: 18:20
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Jobs
Search
View
Inspections
New

Version 3.1.7T

Job Cost Edit

Job Cost Information

	BPA	DOE	ECHO	LANDLORD	LIHEAP	OTHER FUNDS
Roof Cap	0.00	0.00	300.00	0.00	0.00	0.00
Ceiling Insulation	0.00	0.00	0.00	0.00	0.00	0.00
Floor Insulation	0.00	0.00	0.00	0.00	0.00	0.00
Wall Insulation	0.00	0.00	0.00	0.00	0.00	0.00
Duct Insulation	0.00	0.00	0.00	0.00	0.00	0.00
Duct Sealing	0.00	0.00	200.00	0.00	0.00	0.00
Air Infiltration	0.00	0.00	0.00	0.00	800.00	0.00
Window Replacement	0.00	0.00	0.00	0.00	200.00	0.00
Door Replacement	0.00	0.00	0.00	0.00	0.00	0.00
H&S - Other	0.00	0.00	0.00	0.00	0.00	0.00
H&S - ASHRAE	0.00	0.00	800.00	0.00	0.00	0.00
Incidental Repair	0.00	0.00	0.00	0.00	0.00	0.00
Client Ed	0.00	0.00	0.00	0.00	0.00	0.00
Baseload	0.00	0.00	0.00	0.00	0.00	0.00
Furnace Repl - Cost Eff	0.00	0.00	0.00	0.00	0.00	0.00
Furnace Repl - H&S	0.00	0.00	0.00	0.00	0.00	0.00
Furnace Repair	0.00	0.00	0.00	0.00	50.00	0.00
Other	0.00	0.00	0.00	0.00	0.00	0.00

Note: A comment is required when using H&S Other, H&S ASHRAE, Incidental Repair, Furnace Repl - H&S, and Other.

Comments

H&S ASHRAE - ASHRAE Compliant Fan Installed

1000 characters left (spaces count)

Save
Cancel

Data Classification: 1

Oregon Housing and Community Services ©

Figure 4-22: Update Job Cost Screen. Note: Cells are highlighted for ease of reading this manual.

2. Make any necessary changes and click the “Save” button.

3. You now have access to three reports, the ‘Funding Summary’ report (*reference figure 4-23A*), the ‘Weatherization Client’ report (*reference figure 4-23B*) and the ‘Weatherization Job’ report (*reference figure 4-23C*).

H&S – ASHRAE, H&S – Other, and Furnace Replacement yes and no flags are set if you have at least one job cost that has been entered on the job cost screen (*reference figure 4-22*).

To access these reports click on the ‘Funding Summary’ button. (*reference figure 4-23*). the ‘WX Client’ button (*reference figure 4-23*) or the ‘WX Job’ button (*reference figure 4-23*).

DRAFT



Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828

User: JRUTLEDGE
Timeout: 19:07
[Log Out](#)



Client ▾
Program ▾
Hist ▾
Management ▾
Reports ▾
Help ▾

Version 3.1.7T

Jobs

Search

View

Inspections

New

Job View

APC: **CCN-WX-WAL-WX**

JOB REPORTS



[Funding Summary](#)



[WX Client](#)



[WX Job](#)

Note: Click on the blue diamond to view the report definitions.

HOUSEHOLD CLIENT INCOME INFORMATION

Client Name	Age	Income
JEAN-LUC PICARD	95	\$0.00
CAROLE MARCUS	58	\$0.00
MR JAMES THOMAS KIRK	57	\$0.00
DR DAVID MARCUS	40	\$1,200.00
LEONARD MCCOY III	20	\$0.00

[Move Job](#) Click to move this job to a different or vacant Household.

RESIDENCE, APPLICANT, AND HOUSEHOLD INFORMATION

Residence Info	Applicant / Household Info
1701 FEDERATION WAY STE 10F ENTERPRISE, OR 97828	Applicant Name MR JAMES THOMAS KIRK HH Income \$1,200.00

JOB INFORMATION

Job Number	TEST JOB 2	MMBTUS Saved	0
Completion Date	07-30-2020	Fuel Type	OTHER
Job Status	PENDING	Building Type	MOBILE OWNER
Job Type	REWEATHERIZED	Year Built	1950
H&S - ASHRAE	Y	PA Exempted?	N
H&S - Other	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker	XXXX
Reweatherized Or Job Comments	Home Previously Weatherized October 2013. Funds utilized LIHEAP and DOE.		
Primary Contractor	UTOPIA PLANTIA SHIPYARD	Primary Inspector	UNKNOWN
Primary Utility	UNKNOWN	Primary Other Name	
Secondary Utility	UNKNOWN	Secondary Other Name	
Tertiary Utility	UNKNOWN	Tertiary Other Name	

[Edit Job Info](#)

JOB COSTS

Grant	Cost
ECHO	\$1,300.00
LIHEAP	\$1,050.00
Update Job Costs	\$2,350.00

Job Cost Comments:
H&S ASHRAE - ASHRAE Compliant Fan Installed

[Data Classification: 3](#)

Oregon Housing and Community Services ©

Figure 4-23: Job View Screen with jobs costs

Funding Summary Report

Job Number: TEST JOB 2
Applicant Name: MR JAMES THOMAS KIRK
Residence Address: 1701 FEDERATION WAY STE 10F, ENTERPRISE, OR 97828

<u>MEASURE</u>	<u>BPA</u>	<u>DOE</u>	<u>ECHO</u>	<u>LANDLORD</u>	<u>LIHEAP</u>	<u>Other</u>	<u>Total</u>
Roof Cap			300.00				300.00
Duct Sealing			200.00				200.00
Air Infiltration					800.00		800.00
Window Replacement					200.00		200.00
H&S - ASHRAE			800.00				800.00
Furnace Repair					50.00		50.00
Total	0.00	0.00	1,300.00	0.00	1,050.00	0.00	2,350.00

Comments:

H&S ASHRAE - ASHRAE Compliant Fan Installed

Figure 4-23A: [Funding Summary](#)

DRAFT

Job #: TEST JOB 2 Applicant Name: KIRK, JAMES T Program: WX Agency: CCN

**OREGON HOUSING AND COMMUNITY SERVICES DEPARTMENT
Weatherization Client Report**

CLIENT INFORMATION

Household Type : Extended Family
Total Number in Household : 5

Name	DOB	SSN/ID #	SSN VERIF	LG	GN	ET	Race	OTR	ED	DS	HB	VT	NCB
JAMES THOMAS KIRK	20-Mar-1963	***-**-6798	YES	UK	M	H	RF		UK	N	UK	DK	SNAP,OHP,MCARE,OS
JEAN-LUC PICARD	11-May-1925	SJEANLU051125	NO	O	M	NH	WH		MA	Y	N	Y	VAMS
CAROLE MARCUS	11-May-1962	SCAROLE051162	YES	UK	F	NH	WH		UK	N	UK	N	SNAP,OHP,PRA
DAVID MARCUS	02-Jun-1980	SDAVID060280	YES	UK	M	NH	WH		UK	N	UK	N	N
LEONARD MCCOY III	01-Jan-2000	SLEONAR010100	EXCEP	UK	M	RF	RF		UK	RF	UK	N	SNAP,OHP,PRA

PHONE

Phone	Extension	Type
(974) 000-1111		C
(503) 999-8422		C
(503) 999-9999		C
(503) 986-6704		C
(800) 555-0000		P
(503) 999-8422		H
(503) 555-1212		H
(800) 555-9422		C

ADDRESSES

Mailing Address(s) _____ County _____
PO BOX 21, BANDON, OR 97411 COOS

Physical Address(s) _____ County _____
1701 FEDERATION WAY STE 10F, ENTERPRISE, OR 97828 WALLOWA

Type of Dwelling: Multi-Unit (Over 4) Primary Energy Type: OTHER Residence Status: _____ Rent (Heat inc): _____

EMPLOYMENT HAS NOT BEEN RECORDED

Ref	Employer	Address	Phone	Extension
May 26, 2015	11:23:45 AM	Version 1.0 wx_client.rpt	Page 1 of 2	Data Classification: 3

Figure 4-23B: Weatherization Client (Page 1)

Job #: TEST JOB 2 Applicant Name: KIRK, JAMES T Program: WX Agency: CCN

INCOME

Ref	Income Source	Type	Freq	Amount	Annual	Verification/Comments
***-**-6798	NONE - ZERO INCOME STA			\$ 0.00	\$ 0.00	This field is a required if zero income is selected.
SCAROLE05116	DONT KNOW			\$ 0.00	\$ 0.00	
SDAVID060280	SOCIAL SECURITY ADMINIS	SSDI	M	\$ 100.00	\$ 1,200.00	AL
SLEONAR01010	NONE			\$ 0.00	\$ 0.00	
SJEANLU051125	**Missing Income**			\$ 0.00	\$ 0.00	Having Income marked Yes but no income records created

The information you provide will be used to determine if you are eligible for weatherization services. This program is voluntary. If you choose to apply for services you must give all required information. During application processing we may need to ask you for more information in order to determine your eligibility.

APPLICANT DISCLAIMER AND RELEASE
I understand that the information I provide will be used to determine and verify my eligibility for weatherization. I understand that if I feel my application was unjustly denied, I may be entitled to a fair hearing if requested within 30 days of the date of denial. If I feel I have been discriminated against by the local service provider, I may appeal to Oregon Housing and Community Services (OHCS). My signature gives consent for offices of the state and federal governments, their designated subcontractors, and the utility(ies) or home energy supplier(s) to share information, including information about my account.

I authorize _____ to release my utility account information to _____ (agency name) for the purpose of providing services.

Signature of account holder, applicant, or authorized representative (circle one) _____ Date _____

Signature of account holder, applicant, or authorized representative (circle one) _____ Date _____

Agency Certification: The above named applicant has met the income eligibility requirements for the State of Oregon Low Income Weatherization Assistance Program and is authorized to receive weatherization assistance.

Intake Worker Signature _____ Date _____

NOTE: If income is selected for client but no income information is input. Data quality check will display "Missing Income" Message.

May 26, 2015 11:27:52 AM Version 1.0 wx_client.rpt Page 2 of 2 Data Classification: 3

Figure 4-23B: Weatherization Client (Page 2)

WX Job Report

CCN-WX-WAL-WX

Residence Info

1701 FEDERATION WAY STE 10F
ENTERPRISE, OR 97828

Applicant/Household Info

Applicant: MR JAMES THOMAS KIRK
HH Income: \$ 1,200

Job Information

Job Number:	TEST JOB 2	MMBTUS Saved:	0.00
Completion Date:	07-30-2020	Fuel Type:	OTHER
Job Status:	PENDING	Building Type:	MOBILE OWNER
Job Type:	REWEATHERIZED	Year Built:	1950
H & S - ASHRE:	Y	PA Exempted?	N
H & S - Other:	N	Section 106 Completed?	N
Furnace Replacement?	N	Intake Worker:	XXXX

Re-Weatherized Comments:

Home Previously Weatherized October 2013.
Funds utilized LIHEAP and DOE.

Primary Contractor:	UTOPIA PLANTIA S	Primary Inspector:	UNKNOWN
Primary Utility:	UNKNOWN	Primary Other Name:	
Secondary Utility:	UNKNOWN	Secondary Other Name:	
Tertiary Utility:	UNKNOWN	Tertiary Other Name:	

Job Costs

<u>Grant</u>	<u>Cost</u>
ECHO	\$ 1,300.00
LIHEAP	\$ 1,050.00
	<u>\$ 2,350.00</u>

Job Cost Comments:

H&S ASHRAE - ASHRAE Compliant Fan Installed

May 26, 2015

11:19:12 AM

Version 1.3 job.rpt Page 1

Data Classification: 2

Figure 4-23C: [Weatherization Job](#)

Section Five

Energy Education / Kit Components

The user will learn how to post Energy Education training to household and issue/install Kit Components to Households in the OPUS database in this section.

Energy Education

Search Client	158
Energy Education View	160
Energy Education – Add	162
Energy Education – Delete	163

Kit Components

Kit Components View	164
Issue Kit Components	168
Kit Components – Delete	173

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

Energy Education

Setup:

Starting on the '[Client Search](#)' Screen (*reference Figure 5-1*).

The screenshot shows the OPUS Weatherization Client Search interface. At the top, it displays 'Agency: OHCS', 'User: TESTUSER', and 'Timeout: 19:33'. There is a 'Log Out' button and the Oregon Housing and Community Services logo. A navigation menu includes 'Client', 'Program', 'Hist', 'Management', 'Reports', and 'Help'. The sidebar on the left lists 'Client Search', 'Residence', 'Household', 'Move', and 'Energy Education'. The main area is titled 'Client Search' and contains search parameters: SSN/SYSID, Address, Unit (ie Apt B), First Name, City, and Last Name. There are checkboxes for 'Show Residence Info. only' and 'Show Residences With Jobs only'. A 'Search' button is present, along with a note: 'When you Click in Search Results: Client's SSN = Household Screen, Client's Name = Client Screen, Residence Address = Residence Screen. A maximum of 100 results will be returned.' The footer includes 'Oregon Housing and Community Services ©' and 'Data Classification: 3'.

Figure 5-1: Client Search Screen

1. Enter the Client's or SSN/SYSID (Social Security Number or System Identification Number). A search can be completed by any of the fields provided: social security number, first name, last name, system identification number, physical address, city, zip code. When a client has system identification (SYSID#) different from their social security number, it might be beneficial to remove the SISID# from the search box, and search only by the first and last name.
2. Click the "Search" button (*reference Figure 5-1-1*). If "No Results found" is displayed, the client does not exist in the OPUS database and will need to be enter into the system (See Section 2 – Client New).

Agency: OHCS User: TESTUSER Timeout: 18:55

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address [] Unit [] (ie Apt B)

First Name JAMES City []

Last Name KIRK Zip []

Show Residence Info. only Show Residences With Jobs only

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

Client's SSN = Household Screen Advanced Search

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Data Classification: 3

Figure 5-1-1: Client Search Screen

3. Select the correct client from the Search Results section (reference Figure 5-2) and the 'Household View' screen will appear next (reference Figure 5-3).

Agency: OHCS User: TESTUSER Timeout: 19:52

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address [] Unit [] (ie Apt B)

First Name JAMES City []

Last Name KIRK Zip []

Show Residence Info. only Show Residences With Jobs only

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

Client's SSN = Household Screen Advanced Search

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
[REDACTED]	JAMES	KIRK	1992	375 FAIRVIEW AVE SE	APT 210	SALEM
[REDACTED]	JAMES	KIRK	1955	1820 EARLE ST		KLAMATH FALLS
[REDACTED]	JAMES	KIRK	1957	604 JUNIPER DR		PENDLETON
[REDACTED]	JAMES THOMAS	KIRK	1963	333 STARBASE CT	SLIP 9	ENTERPRISE

Data Classification: 3

Figure 5-2: Client Search Screen – Search Results

Note: 'Search Results' are displayed for the first 100 records randomly matching the criteria you enter in a given 'search'. A list resulting of up to 100 individual result records are generated randomly. If specific search criteria entered will result in a more than 100 matches, utilize a redefined search result and narrow down the list generated. *At least one client search field must be filled in.*

- On the 'Household View' Screen (reference Figure 5-3). Click on the 'View' link located on the Left Nav Bar under 'Energy Education'



Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:49



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

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

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

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

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

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

Household View

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

HH Members						Bold Red elements indicate poor data quality					
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SJEANLU051125	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y
<input type="checkbox"/>	SMONTGO051162	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y
<input type="checkbox"/>	SCAROLE051162	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK
<input type="checkbox"/>	123-45-6798	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS
<input type="checkbox"/>	SDAVID060280	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y
<input type="checkbox"/>	SLEONAR010100	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
B	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family ▾*
Household Subsidized	<input type="checkbox"/>

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 5-3: Household View Screen

The 'Energy Education View' screen will appear (reference Figure 5-4).

OPUS Weatherization

Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:36
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Energy Education View Version 3.1.7T

Energy Education

Intake Date: (mm-dd-yyyy)* Initials: TU* Type: CLASSROOM SESSION* Add

Kit Components

New Kit Component

Count	Component	Issue Date	Install Date	Agency
	Component: <input type="text"/> ▾*	Count: <input type="text"/> *	Issued Date: <input type="text"/> *	Installed Date: <input type="text"/> Add

Data Classification: 1

Oregon Housing and Community Services ©

Figure 5-4: Energy Education View Screen.

The 'Energy Education View' screen is divided into two sections. The top section is the **'Energy Education' section** and the bottom section is the 'Kit Components' section.

Add Energy Education:

1. To add energy education completed, enter the required information (Intake Date, EE Worker Initials and Type) and click on the 'Add' button (*reference Figure 5-5-1*).

The screenshot shows the 'Energy Education View' screen. At the top, it displays the agency (OHCS), client (MR JAMES THOMAS KIRK), and residence (ENTERPRISE, OR 97828). The user is TESTUSER and the timeout is 19:33. The screen is divided into several sections: Client, Residence, Household, Move, and Energy Education. The Energy Education section contains a table of existing records and a form to add a new record. The form fields are: Intake Date (07-01-2015), Initials (TU), and Type (IN HOME). The 'Add' button is highlighted with a red circle. Below the form is a section for Kit Components, which includes a table with columns for Count, Component, Issue Date, and Install Date, and an 'Add' button.

Intake Date	Initials	Type	Agency	Action
08-04-2013	JM	IN HOME	OHCS	Delete
08-28-2013	CCS	DURING INTAKE	CCN	Delete
08-30-2013	CSS	CLASSROOM SESSION	CCN	Delete
07-01-2015	TU	IN HOME	OHCS	Add

Figure 5-5-1: Energy Education View Screen - Add.

2. Subsequently, the energy education entered is added to the Energy Education information displayed (*reference Figure 5-5-2*).

The screenshot shows the 'Energy Education View' screen after the record has been added. The table now includes the new record with Intake Date 07-01-2015, Initials TU, and Type IN HOME. The 'Add' button is no longer visible. The form fields for adding a new record are now empty. The 'Kit Components' section remains the same.

Intake Date	Initials	Type	Agency	Action
08-04-2013	JM	IN HOME	OHCS	Delete
08-28-2013	CCS	DURING INTAKE	CCN	Delete
08-30-2013	CSS	CLASSROOM SESSION	CCN	Delete
07-01-2015	TU	IN HOME	OHCS	Delete

Figure 5-5-2: Energy Education View Screen - Completed.

Delete Energy Education:

1. To delete energy education completed, locate the information you wished deleted and click the 'Delete' button located immediately to the right of that line (*reference Figure 5-6-1*).

The screenshot shows the 'Energy Education View' screen. At the top, it displays 'Agency: OHCS', 'Client: MR JAMES THOMAS KIRK', 'Residence: ENTERPRISE, OR 97828', 'User: TESTUSER', and 'Timeout: 19:33'. There is a 'Log Out' button and a 'Help' menu. The main content area is titled 'Energy Education View' and contains a table of energy education records. The first record is highlighted with a red circle, and its 'Delete' button is also circled in red. The table has columns for 'Intake Date', 'Initials', 'Type', and 'Agency'. Below the table, there are fields for 'Intake Date', 'Initials', and 'Type' with an 'Add' button. There is also a 'Kit Components' section with a 'New Kit Component' button and a table with columns for 'Count', 'Component', 'Issue Date', 'Install Date', and 'Agency'. At the bottom, there is a 'Data Classification: 1' label.

Figure 5-6-1: Energy Education View Screen - Delete.

2. Subsequently, the energy education selected is deleted from the Energy Education information displayed (*reference Figure 5-6-2*).

The screenshot shows the 'Energy Education View' screen after the selected record has been deleted. The table now shows only two records. The first record is 'Intake Date: 08-28-2013, Initials: CCS, Type: DURING INTAKE, Agency: CCN' and the second is 'Intake Date: 08-30-2013, Initials: CSS, Type: CLASSROOM SESSION, Agency: CCN'. The 'Delete' buttons are still present next to these records. The 'Intake Date' field is now empty, and the 'Type' dropdown is set to 'CLASSROOM SESSION'. The 'Add' button is still present. The 'Data Classification: 1' label is still at the bottom.

Figure 5-6-2: Energy Education View Screen - Completed.

NOTE: You will only be able to delete kit components issued by your agency or if applicable a sub-recipient of your agency.

Kit Components

Setup:

Starting on the 'Client Search' Screen (*reference Figure 5-7*).

OPUS
Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:46
Log Out

Oregon
Housing and Community Services

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Client Search

Search Parameters (at least one field required)

SSN/SYSID Address Unit (ie Apt B)

First Name City

Last Name Zip

Show Residence Info. only Show Residences With Jobs only

When you Click in Search Results:

Client's SSN = Household Screen Advanced Search

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Data Classification: 3

Oregon Housing and Community Services ©

Figure 5-7: Client Search Screen

1. Enter the Client's or SSN/SYSID (Social Security Number or System Identification Number). A search can be completed by any of the fields provided: social security number, first name, last name, system identification number, physical address, city, zip code. When a client has a system identification (SYSID#) different from their social security number, it might be beneficial to remove the SISID# from the search box, and search only by the first and last name.
2. Click the "Search" button (*reference Figure 5-7-1*). If "No Results found" is displayed, the client does not exist in the OPUS database and will need to be enter into the system (See Section 2 – Client New).

Agency: OHCS User: TESTUSER Timeout: 18:55

Client Program Hist Management Reports Help

Client Search View New Edit

Residence View New Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address [] Unit [] (ie Apt B)

First Name JAMES City []

Last Name KIRK Zip []

Show Residence Info. only Show Residences With Jobs only

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

Client's SSN = Household Screen

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Data Classification: 3

Oregon Housing and Community Services ©

Figure 5-7-1: Client Search Screen

3. Select the correct client from the Search Results section (reference Figure 5-8) and the 'Household View' screen will appear next (reference Figure 5-9).

Agency: OHCS User: TESTUSER Timeout: 19:52

Client Program Hist Management Reports Help

Client Search View New Edit

Residence View New Edit

Household View Mail/Ph Update NCB Update

Move Client to HH HH to Residence Merge HH

Energy Education View Kit Component New

Client Search

Search Parameters (at least one field required)

SSN/SYSID [] Address [] Unit [] (ie Apt B)

First Name JAMES City []

Last Name KIRK Zip []

Show Residence Info. only Show Residences With Jobs only

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

Client's SSN = Household Screen

Client's Name = Client Screen

Residence Address = Residence Screen

A maximum of 100 results will be returned.

Search Results						
SSN #	First Name	Last Name	Birth Year	Address	Unit	City
[REDACTED]	JAMES	KIRK	1992	375 FAIRVIEW AVE SE	APT 210	SALEM
[REDACTED]	JAMES	KIRK	1955	1820 EARLE ST		KLAMATH FALLS
[REDACTED]	JAMES	KIRK	1957	604 JUNIPER DR		PENDLETON
[REDACTED]	JAMES THOMAS	KIRK	1963	333 STARBASE CT	SLIP 9	ENTERPRISE

Data Classification: 3

Oregon Housing and Community Services ©

Figure 5-8: Client Search Screen – Search Results

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

4. On the ‘Household View’ Screen (*reference Figure 5-9*). Click on the ‘Kit Component New’ link located on the Left Nav Bar under ‘Energy Education’.

DRAFT



Agency: OHCS
 Client: MR JAMES THOMAS KIRK
 Residence: ENTERPRISE, OR 97828

User: TESTUSER
 Timeout: 19:49



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Household View

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

HH Members					Bold Red elements indicate poor data quality							
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
<input type="checkbox"/>	SJEANLU051125	JEAN-LUC PICARD	90	M	MA	Y	Y	NH	S	Y	Y	
<input type="checkbox"/>	SMONTGO051162	MONTGOMERY SCOTT	53	M	DK	Y	N	NH	S	Y	Y	
<input type="checkbox"/>	SCAROLE051162	CAROLE MARCUS	53	F	DK	N	N	NH	S	Y	DK	
<input type="checkbox"/>	123-45-6798	MR JAMES THOMAS KIRK	52	M	DK	DK	N	H	RF	Y	ZIS	
<input type="checkbox"/>	SDAVID060280	DR DAVID MARCUS	35	M	DK	N	N	NH	S	Y	Y	
<input type="checkbox"/>	SLEONAR010100	LEONARD MCCOY III	15	M	DK	N	RF	RF	RF	Y	N	

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

To Remove Household: Click this button

Jobs

Agency	Number	Type	Status	Cost	Completion Date
CCN	TEST JOB 2	REWEATHERIZED	PENDING	\$2,350.00	07-30-2020
CCN	TEST JOB 1	WEATHERIZED	COMPLETED	\$0.00	10-30-2005

Address

T	Address
B	333 STARBASE CT SLIP 9 ENTERPRISE, OR 97828

Income Summary

MONTGOMERY SCOTT	\$3,000.00
DR DAVID MARCUS	\$1,200.00

Phones

T	Number	Client Name
C	(503) 986-6704	CAROLE MARCUS
P	(800) 555-0000	CAROLE MARCUS
C	(503) 999-8422	JEAN-LUC PICARD
P	(800) 555-0000	JEAN-LUC PICARD
H	(503) 555-1212	LEONARD MCCOY III
P	(800) 555-0000	LEONARD MCCOY III
H	(800) 555-9422	MONTGOMERY SCOTT
C	(974) 000-1111	DR DAVID MARCUS
C	(800) 555-9422	DR DAVID MARCUS
P	(800) 555-0000	DR DAVID MARCUS
C	(503) 999-9999	MR JAMES THOMAS KIRK
C	(800) 555-9422	MR JAMES THOMAS KIRK
H	(503) 999-8422	MR JAMES THOMAS KIRK
P	(800) 555-0000	MR JAMES THOMAS KIRK

Household Summary

Total Income	\$4,200.00
% of Poverty	13%
% of OMI	5%
Total # of Persons	6
HH Type	Extended Family ▾*
Household Subsidized	<input type="checkbox"/>

HH Comments

This is the hh coments section which allows a total of 2000 characters/

1929 characters left (spaces count)

Data Classification: 3

Oregon Housing and Community Services ©

Figure 5-9: Household View Screen

The 'Kit Components HH New' screen will appear (reference Figure 5-10).

Issue Kit Components

OPUS Weatherization

Agency: OHCS
 Client: JAMES TIBEROUS KIRK III
 Residence: SALEM, OR 97304

User: TESTUSER
 Timeout: 19:10
 Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Kit Component HH New

Kit Components

Add Single Date To Issued: (mm-dd-yyyy)
 Add Single Date To Installed: (mm-dd-yyyy)

777 ELECTRIC KIT			
Component	Count	Issued Date (mm-dd-yyyy)	Installed Date (mm-dd-yyyy)
<input type="checkbox"/> OUTLET GASKET	5		
<input type="checkbox"/> REGISTER HEAT DEFLECTOR	55		
<input type="checkbox"/> SHOWER TIMER-GAS	23		

OHCS EN KIT			
Component	Count	Issued Date (mm-dd-yyyy)	Installed Date (mm-dd-yyyy)
<input type="checkbox"/> CFL	4		
<input type="checkbox"/> HOT WATER THERMOMETER	3		
<input type="checkbox"/> REGISTER HEAT DEFLECTOR	2		

Data Classification: 1

Oregon Housing and Community Services ©

Figure 5-10: Kit Component HH New Screen

Note: If there have been no kits built for your agency your screen will look as follows (reference Figure 5-11) and you will need to create kit components to proceed (See Section M1 Agency Management Functions – Kit Components).



Figure 5-11: Kit Component HH New Screen - No Kits Created

You can now select individual components from different kits or by utilizing the 'Check All' button you can select all components of all the kits create by that agency (reference Figure 5-12). **NOTE:** If there are like components in different kits it will not sum the total rather it will create a separate entry from each kit.

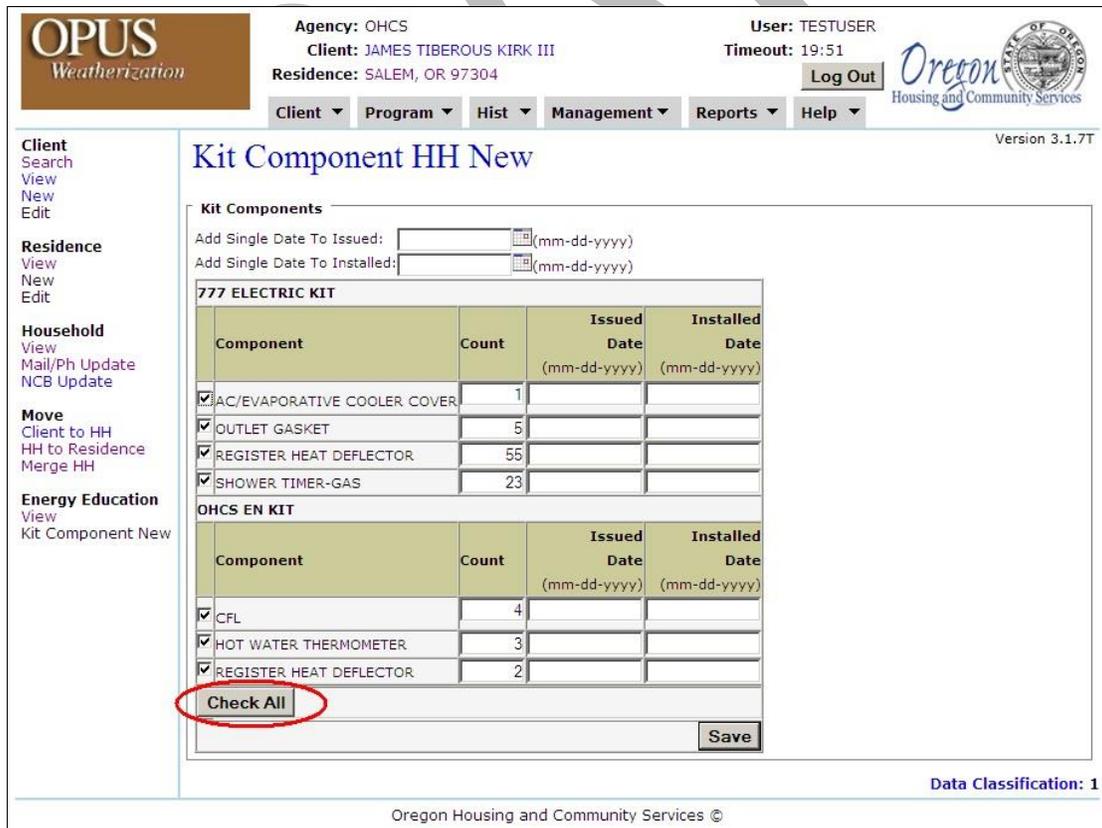


Figure 5-12: Kit Component HH New Screen – Check All

You can utilize a single date for issue and/ or installed for all components checked (NOTE as you ‘Tab’ out of the field the dates in the respective field will autofill) (reference Figure 5-13). You can input different individual Issued Date’s and Installed Date’s (reference Figure 5-14).

OPUS Weatherization

Agency: OHCS
 Client: JAMES TIBEROUS KIRK III
 Residence: SALEM, OR 97304

User: TESTUSER
 Timeout: 7:16
 Log Out

Client Program Hist Management Reports Help

Version 3.1.71

Kit Component HH New

Kit Components

Add Single Date To Issued: 09-19-2013 (mm-dd-yyyy)
 Add Single Date To Installed: 09-19-2013 (mm-dd-yyyy)

777 ELECTRIC KIT			
Component	Count	Issued Date (mm-dd-yyyy)	Installed Date (mm-dd-yyyy)
<input checked="" type="checkbox"/> AC/EVAPORATIVE COOLER COVER	1	09-19-2013	
<input checked="" type="checkbox"/> OUTLET GASKET	5	09-19-2013	
<input checked="" type="checkbox"/> REGISTER HEAT DEFLECTOR	55	09-19-2013	
<input checked="" type="checkbox"/> SHOWER TIMER-GAS	23	09-19-2013	

OHCS EN KIT			
Component	Count	Issued Date (mm-dd-yyyy)	Installed Date (mm-dd-yyyy)
<input checked="" type="checkbox"/> CFL	4	09-19-2013	
<input checked="" type="checkbox"/> HOT WATER THERMOMETER	3	09-19-2013	
<input checked="" type="checkbox"/> REGISTER HEAT DEFLECTOR	2	09-19-2013	

Data Classification: 1

Oregon Housing and Community Services ©

Figure 5-13: Kit Component HH New Screen – Add Single Issue/Install Dates.

Agency: OHCS
Client: JAMES TIBEROUS KIRK III
Residence: SALEM, OR 97304

User: TESTUSER
Timeout: 15:09
Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Kit Component HH New

Kit Components

Add Single Date To Issued: (mm-dd-yyyy)
Add Single Date To Installed: (mm-dd-yyyy)

777 ELECTRIC KIT				
Component	Count	Issued Date	Installed Date	
		(mm-dd-yyyy)	(mm-dd-yyyy)	
<input type="checkbox"/> AC/EVAPORATIVE COOLER COVER	1			
<input checked="" type="checkbox"/> OUTLET GASKET	5	09-19-2013		
<input type="checkbox"/> REGISTER HEAT DEFLECTOR	55			
<input type="checkbox"/> SHOWER TIMER-GAS	23			

OHCS EN KIT				
Component	Count	Issued Date	Installed Date	
		(mm-dd-yyyy)	(mm-dd-yyyy)	
<input type="checkbox"/> CEI	4			
<input checked="" type="checkbox"/> HOT WATER THERMOMETER	3	08-12-2013	09-01-2013	
<input type="checkbox"/> REGISTER HEAT DEFLECTOR	2			

Check All

Save

Data Classification: 1

Oregon Housing and Community Services ©

Figure 5-14: Kit Component HH New Screen – Separate Issue/Install Dates.

Once you have completed your selection click on 'Save' button

Alternatively, you can add/issue and/or install individual components from the 'Component' dropdown list. Select the component, enter the count (quantity), issue date and if known the installed date. ((reference Figure 5-15).



Agency: TEST
 Client: JAMES TIBEROUS KIRK III
 Residence: SALEM, OR 97304

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



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Client
Search
View
New
Edit

Residence
View
New
Edit

Household
View
Mail/Ph Update
NCB Update

Move
Client to HH
HH to Residence
Merge HH

Energy Education
View
Kit Component New

Energy Education View

Energy Education

Intake	10-11-2011	Initials:	BH	Type:	CLASSROOM SESSION	Agency:	OHCS
Date:		Intake	09-16-2013	Initials:	BH	Type:	CLASSROOM SESSION
Date:		Agency:					OHCS

Intake Date: (mm-dd-yyyy)* **Initials:** * **Type:** * [Add](#)

Kit Components

New Kit Component

	Count	Component	Issue Date	Install Date	Agency	
	3	HOT WATER THERMOMETER	08-12-2013	09-01-2013	OHCS	
	2	CFL	09-16-2013		TEST	Delete
	3	DRIP GAUGE	09-16-2013		TEST	Delete
	80	PIPE WRAP	09-16-2013		ACCESS	
	1	SHOWER TIMER-GAS	09-16-2013		TEST	Delete
	3	RECYCLE TOTE BAG	09-18-2013	09-18-2013	ORCCA	
	3	SHOWERHEAD 1.50 GPM-ELECTRIC	09-18-2013	09-18-2013	ORCCA	
	3	WEATHERSTRIP VFLEX VINYL	09-18-2013	09-18-2013	ORCCA	
	5	OUTLET GASKET	09-19-2013		OHCS	

Component: **Count:** **Issued Date:** **Installed Date:** [Add](#)

Data Classification: 1

Oregon Housing and Community Services ©

Figure 5-15: 'Energy Education View' Screen – Add Component.

Delete Kit Components

From the 'Energy Education View' screen you can delete kit components by selecting the 'Delete' button immediately to the right of the components display (*reference Figure 5-16*). You will only be able to delete kit components issued by your agency or if applicable a sub-recipient of your agency.

The screenshot shows the 'Energy Education View' interface. At the top, there is a header with the OPUS Weatherization logo, user information (Agency: TEST, Client: JAMES TIBEROUS KIRK III, Residence: SALEM, OR 97304, User: TESTUSER, Timeout: 19:50), and navigation menus (Client, Program, Hist, Management, Reports, Help). A sidebar on the left contains navigation options for Client, Residence, Household, Move, and Energy Education. The main content area is titled 'Energy Education View' and contains two sections: 'Energy Education' and 'Kit Components'.

The 'Energy Education' section shows a table of energy education sessions with columns for Intake Date, Intake Date, Initials, Type, and Agency. Below this is a form to add a new session with fields for Intake Date, Initials, Type, and an Add button.

The 'Kit Components' section has a 'New Kit Component' button and a table of kit components. The table has columns for Count, Component, Issue Date, Install Date, and Agency. To the right of each row is a 'Delete' button. The 'Delete' button for the 'DRIP GAUGE' component is circled in red.

Count	Component	Issue Date	Install Date	Agency	Delete
3	HOT WATER THERMOMETER	08-12-2013	09-01-2013	OHCS	
2	CFL	09-16-2013		TEST	Delete
3	DRIP GAUGE	09-16-2013		TEST	Delete
80	PIPE WRAP	09-16-2013		ACCESS	
1	SHOWER TIMER-GAS	09-16-2013		TEST	Delete
3	RECYCLE TOTE BAG	09-18-2013	09-18-2013	ORCCA	
3	SHOWERHEAD 1.50 GPM-ELECTRIC	09-18-2013	09-18-2013	ORCCA	
3	WEATHERSTRIP VFLEX VINYL	09-18-2013	09-18-2013	ORCCA	
5	OUTLET GASKET	09-19-2013		OHCS	

At the bottom of the 'Kit Components' section, there is a form to add a new component with fields for Component, Count, Issued Date, Installed Date, and an Add button.

Version 3.1.7T
Data Classification: 1
Oregon Housing and Community Services ©

Figure 5-16: Kit Component HH New Screen – Separate Issue/Install Dates.

NOTE: To install kit components after items have been issued, you will need to delete the component and then add the kit components with the issue date and install date field completed.

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DRAFT

Section Six

Reports

The user will learn how to utilize the reports available to users in the OPUS Weatherization Module.

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<u>Global Client Characteristics</u>	182
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<u>Health & Safety Jobs Costs</u>	213
<u>Furnace Replacement</u>	215

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

Setup:

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

1. Pass your cursor over 'Reports' on the main menu (reference Figure 6-1) and select 'WX' from the dropdown list. The 'Reports' screen will appear next. (reference Figure 6-2).

OPUS Weatherization

Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:54
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Search Client

Change Password?
Edit Your User Account

Message of the Day

WELCOME! To start OPUS - Click Search Client

System Issue? Contact us @ opushelp@oregon.gov, or by phone 1-800-453-5511, option #6.

Daily Notices	Program Notices	OPUS Help
<p>01-22-2014 - The system was updated to Version 3.0.5 on 01/21/2014. Please report ALL issues to the HelpDesk.</p> <p>10-23-2013 - The system was updated to Version 3.0.4 on 10/22/2013. Please report ALL issues to the HelpDesk.</p> <p>10-16-2013 - The system was updated to Version 3.0.3 on 10/15/2013. Please report ALL issues to the HelpDesk.</p>	<p>10-03-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p> <p>09-27-2013 - ALL IE 10 Update, Sprint #15, & 2014 Payment year changes will be deployed to Opus Production on this Weekend, Sept 28 & 29.</p> <p>09-17-2013 - Opus Test is available for Training! Please contact Opus Helpdesk with dates and times so we can suspend updates during your training session.</p> <p>03-31-2013 - HMIS All HMIS users current have View Access only while data is being pulled.</p> <p>03-19-2013 - Internet Explorer 10 Incompatibility Microsoft made significant changes in IE10 that causes Opus not to work correctly. While we are modifying every page to make them compatible (a substantial amount of work), please use IE9 or an earlier version.</p>	<p>E-mail: opushelp@oregon.gov</p> <p>10-03-2013 - To expedite Opus HelpDesk assistance, please include contact information when emailing.</p> <p>01-14-2010 - Never send full SSNs to Helpdesk! E-mail is not secure. You put your clients at risk if you do. Only name and last 4 of SSN is needed.</p> <p>06-19-2009 - Password Resets OPUS Helpdesk does not issue passwords. When a new user account is created or an existing account is reset, a temporary password is automatically generated & sent by the system to the users email account. OPUS Helpdesk has no control over this. If you need to have your password reset, please contact your agencies OPUS System Administrator.</p> <p>08-01-2007 - HMIS Help Manual updated.</p> <p>01-05-2007 - If your Main Nav Drop-Down is not working, please e-mail the Opus helpdesk. This is a problem with Internet Explorer and we will help you fix it.</p>

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-1: Message of the Day Screen – Main Menu

2. By default the Standard 'Reports' screen will appear. To change to 'Historical' reports screen click on the 'Historical' link of the left nav bar (reference Figure 6-16) and the Historical reports Screen will appear (reference Figure 6-16).

3. Click on the desired report link and the appropriate input screen will appear.

OPUS
Weatherization

Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:50
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Reports

- ◆ Quarterly Report
- ◆ Client Characteristics
- ◆ Global Client Characteristics
- ◆ Grant Costs
- ◆ Re-Weatherization
- ◆ Health & Safety Job Costs
- ◆ Furnace Replacement
- ◆ SHPO
- ◆ Energy Type Labels
- ◆ ZIP Code Labels
- ◆ Monitor Completion Report
- ◆ Residence Change
- ◆ WX Referral

Version 3.1.7T

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-2: [Standard Reports Screen](#)

5. Click on the desired report link and the appropriate report input screen will appear.

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:09
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Quarterly Report

Version 3.1.7T

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
OHCS-WX-WX *

Completion Date - From 01-01-2000 (mm-dd-yyyy)

Completion Date - To 05-01-2050 (mm-dd-yyyy)

Job Status: Completed Pending Both

Note: Reports will open in a new window.

Submit

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-3A: Standard - [Quarterly Report Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To, Job Status) and Click on the ‘Submit’ button (*reference Figure 6-3A*). The report will then display containing the requested information (*reference Figure 6-3B*).

Quarterly Report

APC: OHCS-WX-WX
FROM: 01-01-2000 **TO** 05-01-2050
PENDING: BOTH
GRANT: All Grants

FUEL TYPE COUNT

Electric:	1,929	Natural Gas:	443	Propane:	34
Oil:	51	Wood:	56	Other:	8

	TOTALS
Total Energy Savings in BTU's	34,042
OWNER Single Family Stick Units	831
RENTER Single Family Stick Units	144
MOBILE Owner Units	1,105
MOBILE Renter Units	79
Multi-Family Units	150
SHELTER Units (800 sq. ft. = 1 unit)	34
DUPLEX Units	99
TRIPLEX Units	5
FOURPLEX Units	74
Total Furnace Replacements	443
Baseload Only Units (Baseload Only BTUS)	145(304)
Weatherization Units	2,350
Re-Weatherization Units	26
TOTAL Units	2,521
Health and Safety Units	2,030
Total Units with Seniors	1,233
Total Units with Children Under 6	275
Total Units with Disabled person(s)	815
Total Units with Native American person(s)	131
Total PEOPLE Served (total of all household members)	5,588
Total # of SENIOR Served	1,503
Total # of CHILDREN Under 6 Served	361
Total # of DISABLED Served	907
Total # of NATIVE AMERICANS Served	256

Figure 6-3B: Standard - Quarterly Report

NOTE: First page of Quarterly report is a rollup. Following pages breakdown by individual grants

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:09
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Client Characteristics

Version 3.1.7T

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
OHCS-WX-WX ▾*

Completion Date - From 01-01-2000 * (mm-dd-yyyy)

Completion Date - To 05-01-2050 * (mm-dd-yyyy)

Note: Reports will open in a new window. **Submit**

NOTICE : This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-4A: Standard – Client Characteristic Screen

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Submit’ button (*reference Figure 6-4A*). The report will then display containing the requested information (*reference Figure 6-4B*).

PROGRAM PARTICIPANT CHARACTERISTICS

Agency - County OHCS -
 Sub Grantee/Program - Grant: WX- WX

From: 01/01/2000
 To: 05/01/2050

3. Total unduplicated number of persons about whom one or more characteristics were obtained:	4,635
4. Total unduplicated number of persons about whom no characteristics were obtained:	0
5. Total unduplicated number of households about whom one or more characteristics were obtained:	2,015
6. Total unduplicated number of households about whom no characteristics were obtained:	0

NUMBER OF PERSONS	NUMBER OF HOUSEHOLDS		
7. Gender			
a. Male	1,987		
b. Female	2,635		
TOTAL*	4,622		
8. Age			
a. 0 - 5	304		
b. 6 - 11	460		
c. 12 - 17	494		
d. 18 - 23	345		
e. 24 - 44	976		
f. 45 - 54	513		
g. 55 - 59	297		
h. 60 - 69	593		
i. 70 & Up	653		
TOTAL*	4,635		
9-I. Ethnicity			
a. Hispanic or Latino	1,328		
b. Not Hispanic or Latino	3,191		
TOTAL*	4,519		
9-II. Race			
a. White	3,887		
b. Black or African American	32		
c. American Indian / Alaska Native	160		
d. Asian	27		
e. Native Hawaiian / Pacific Islander	13		
f. Multi-Race	99		
TOTAL*	4,218		
10. Education Levels of Adults			
a. 0 - 8	288		
b. 9 - 12 / Non Graduate	514		
c. High School Graduate/GED	1,057		
d. 12+ Some Post Secondary	428		
e. College Graduate	313		
TOTAL**	2,600		
11. Other Characteristics			
	Yes No TOTAL*		
a. Health Ins	3,041	1,285	4,326
b. Disabled	782	3,822	4,604
c. Veteran	229	4,314	4,543
12. Household Type			
a. Single Parent, Female	220		
b. Single Parent, Male	25		
c. Two Parent Household	340		
d. Single Person	701		
e. Two Adult/No Children	359		
f. Other	133		
TOTAL***	1,778		
13. Household Size			
a. One	877		
b. Two	475		
c. Three	231		
d. Four	190		
e. Five	142		
f. Six	68		
g. Seven	23		
h. Eight or More	9		
TOTAL ***	2,015		
14. Source of Household Income			
a. Unduplicated # Households Reporting One or More Sources of Income	1,898		
b. Unduplicated # Households Reporting Zero Income	117		
TOTAL Unduplicated # Households Reporting One or More Sources of Income or Zero Income ***	2,015		
c. TANF	86		
d. SSI	239		
e. Social Security	879		
f. Pension	170		
g. General Assistance	3		
h. Unemployment Insurance	145		
i. Employment + Other Source	242		
j. Employment Only	434		
k. Other	409		
15. Level of Household Income			
a. Up to 50%	306		
b. 51% - 75%	206		
c. 76% - 100%	364		
d. 101% - 125%	342		
e. 126% - 150%	338		
f. 151% - 175%	277		
g. 176% - 200%	159		
h. 201% and over	23		
TOTAL ***	2,015		
16. Housing			
a. Own	1,457		
b. Rent	556		
c. Homeless	0		
d. Other	0		
TOTAL***	2,013		

*The sum of this category should not exceed the value of item 3
 **The sum of this category should not exceed the value of item 8 e-h
 ***The sum of this category should not exceed the value of item 5

Report Date: 7/6/15

Client Characteristics Report 3.1

Data Classification: 1

Figure 6-4B: Standard – Client Characteristic Report

Agency: OHCS User: TESTUSER Timeout: 18:48 Log Out Oregon Housing and Community Services Version 3.1.7T

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Global Client Characteristics Report

Standard
Historical

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Intake Date From: 10/01/2013 e.g. MMDDYYYY
Intake Date To: 05/30/2015 e.g. MMDDYYYY

Select one or more agencies: **ALL**
ACCESS
CAMPBELL COMMUNITY CENTER
CATHOLIC CHARITIES

Select one or more programs: WX
WORKSHOP 11
WORKSHOP 12

Select one or more counties: **ALL**
BAKER
BENTON
CLACKAMAS

Select one or more grants: **ALL**
09 CCLEP
09 HREP
09 ORH

Submit

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-5A: Standard – Global Client Characteristic Screen

Select the require information (i.e. Intake Date – From, Intake Date – To, Agencies, Programs, Counties and Grants) and Click on the ‘Submit’ button (*reference Figure 6-5A*). The report will then display containing the requested information (*reference Figure 6-5B*).

NOTE: *This report man take some time to process. It may appear at times that you system has locked up.*

PROGRAM PARTICIPANT CHARACTERISTICS

Agency - County OHCS - ALL

Sub Grantee/Program - Grant: Multiple- ALL

From: 10/10/2013

To: 05/30/2015

3. Total unduplicated number of persons about whom one or more characteristics were obtained:	1,446
4. Total unduplicated number of persons about whom no characteristics were obtained:	0
5. Total unduplicated number of households about whom one or more characteristics were obtained:	616
6. Total unduplicated number of households about whom no characteristics were obtained:	0

NUMBER OF PERSONS		NUMBER OF HOUSEHOLDS	
7. Gender			
a. Male			620
b. Female			823
TOTAL*			1,443
8. Age			
a. 0 - 5	86	f. 45 - 54	164
b. 6 - 11	148	g. 55 - 59	89
c. 12 - 17	161	h. 60 - 69	159
d. 18 - 23	116	i. 70 & Up	229
e. 24 - 44	294	TOTAL*	1,446
9-I. Ethnicity			
a. Hispanic or Latino			469
b. Not Hispanic or Latino			943
TOTAL*			1,412
9-II. Race			
a. White			1,190
b. Black or African American			10
c. American Indian / Alaska Native			36
d. Asian			8
e. Native Hawaiian / Pacific Islander			8
f. Multi-Race			29
TOTAL*			1,281
10. Education Levels of Adults			
a. 0 - 8			94
b. 9 - 12 / Non Graduate			156
c. High School Graduate/GED			342
d. 12+ Some Post Secondary			106
e. College Graduate			111
TOTAL**			809
11. Other Characteristics			
	Yes	No	TOTAL*
a. Health Ins	973	393	1,366
b. Disabled	224	1,219	1,443
c. Veteran	76	1,361	1,437
12. Household Type			
a. Single Parent, Female			72
b. Single Parent, Male			14
c. Two Parent Household			105
d. Single Person			211
e. Two Adult/No Children			108
f. Other			46
TOTAL***			556
13. Household Size			
a. One			248
b. Two			161
c. Three			72
d. Four			65
e. Five			38
f. Six			19
g. Seven			9
h. Eight or More			4
TOTAL ***			616
14. Source of Household Income			
a. Unduplicated # Households Reporting One or More Sources of Income			583
b. Unduplicated # Households Reporting Zero Income			33
TOTAL Unduplicated # Households Reporting One or More Sources of Income or Zero Income ***			616
c. TANF			29
d. SSI			68
e. Social Security			280
f. Pension			41
g. General Assistance			2
h. Unemployment Insurance			44
i. Employment + Other Source			83
j. Employment Only			134
k. Other			123
15. Level of Household Income			
a. Up to 50%			84
b. 51% - 75%			50
c. 76% - 100%			119
d. 101% - 125%			108
e. 126% - 150%			107
f. 151% - 175%			87
g. 176% - 200%			56
h. 201% and over			5
TOTAL ***			616
16. Housing			
a. Own			488
b. Rent			127
c. Homeless			0
d. Other			0
TOTAL***			615

*The sum of this category should not exceed the value of item 3
 **The sum of this category should not exceed the value of item 8 e-h
 ***The sum of this category should not exceed the value of item 5

Report Date: 7/6/15

Client Characteristics Report 3.1

Data Classification: 1

Figure 6-5B: Standard – Global Client Characteristic Report

OPUS
Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:28
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Grant Costs

Version 3.1.7T

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
OHCS-WX-WX ▾

Completion Date - From 01-01-2000 (mm-dd-yyyy)

Completion Date - To 05-01-2050 (mm-dd-yyyy)

Job Status: Completed Pending Both

Note: Reports will open in a new window.

Submit

NOTICE : This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-6A: [Standard – Grant Costs Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To, Job Status) and Click on the ‘Submit’ button (*reference Figure 6-6A*). The report will then display containing the requested information (*reference Figure 6-6B*).

Grant Costs for OHCS-WX-WX

From 01/01/2000 To 05/01/2050

Pending: Both

ARRA

<u>Agency</u>	<u>Job #</u>	<u>Grant Cost</u>
ACCESS	AVIA12	\$15,765.12
ACCESS	BROS12	\$6,677.67
ACCESS	FLEE12	\$3,415.10
ACCESS	GOOW12	\$7,076.64
ACCESS	HANJ12	\$5,180.14
ACCESS	MCKR12	\$2,456.74
ACCESS	SHIN12	\$2,799.09
CAO	81330	\$1,364.00
CAO	81387	\$951.00
CAO	81430	\$1,386.00
CAO	81697	\$231.00
CCSSD	2013-018	\$713.55
MULTCO	34354	\$0.01
MWVCAA	11527	\$4,850.20
MWVCAA	11572	\$7,692.34
MWVCAA	11596	\$9,357.85
MWVCAA	11603	\$3,046.63
MWVCAA	11641	\$10,246.00
MWVCAA	11745	\$880.00
SILETZ	12	\$4,535.62
SILETZ	14	\$1,196.11
SILETZ	16	\$3,400.90
SILETZ	17	\$1,952.18
SILETZ	18	\$2,967.30
SILETZ	19	\$1,986.51
SILETZ	20	\$2,261.00
SILETZ	7	\$3,553.25
		<hr/>
		\$105,941.95

BPA

<u>Agency</u>	<u>Job #</u>	<u>Grant Cost</u>
ACCESS	DANK13	\$4,668.77
ACCESS	DEMH13	\$3,116.84
ACCESS	HARR13	\$2,627.34
ACCESS	HENS13	\$2,622.64
ACCESS	JILS13	\$3,839.23
ACCESS	KINV13	\$1,473.71
ACCESS	LARR13	\$660.00
ACCESS	LELT13	\$1,096.16
ACCESS	RAZR13	\$1,227.55
ACCESS	STAD13	\$762.00
ACCESS	WOOM13	\$1,153.48
CAO	1234	\$100.00
CAO	81430	\$2,052.00
CAO	81485-1	\$4,663.66
CAO	81539	\$2,241.17
CAO	81556	\$488.00

Date Printed: 7/6/15

12:38:35 PM

Rev. 1.0 wx_grant_costs.rpt

Page 1 of 80 Data Classification: 1

Figure 6-6B: Standard – Grant Costs Report

Agency: OHCS User: TESTUSER Timeout: 19:49 Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Re-Weatherization Report

Version 3.1.7T

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
OHCS-WX-WX ▾

Completion Date - From 01-01-2000 (mm-dd-yyyy)

Completion Date - To 05-01-2050 (mm-dd-yyyy)

Note: Reports will open in a new window.

NOTICE : This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Submit

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-7A: [Standard - Re Weatherization Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Submit’ button (*reference Figure 6-7A*). The report will then display containing the requested information (*reference Figure 6-7B*).

Re - Weatherized

APC: OHCS-WX-W
 From: 01-01-2000 To: 05-01-2050

<u>Agency</u>	<u>Job#</u>	<u>Completion Date</u>	<u>Street Address</u>	<u>Re-weatherized Comments</u>
ACCESS	HENS13	08-23-2013	321 CLAY ST	using BPA funds other funds is BPA bulk purchase of heat pumps, 2011
CAT	C13-008	01-17-2013	33973 SE ELM ST	Older furnace was evaluated by auditor as fuctional at time of weatherization. Furnace stopped working, cost for replacement parts due to age of furnace not economical nor assure continued operation; more cost effective to replace.
CAT	C13-018	03-05-2013	233 NE 7TH ST	Furnace broke after WX. Replaced with new electric furnace
CAT	C13-022	03-25-2013	942 1ST AVE	Repaired furnace during WX, the furnace broke. We replaced.
CAT	C13-023	05-13-2013	64825 DEER ISLAND HTS	correct venting issue on existing bath fan in 2nd bathroom.
CAT	C14-009	10-11-2013	74866 DOAN RD	RE-WX for electrical repair only
CAT	K13-020	05-13-2013	110 NW 4TH ST	fixed furnace thermostat
CAT	T13-008	01-17-2013	3370 GIENGER RD	Replace rusted and leaky DHW and repaired water damaged floors in DHW closet, in the living and bath rooms. Auditor missed adding DHW measure at time of weathering the home in FY2011.
CSC	12100	12-31-2012	277 NE CONIFER BLVD	No Heat
CSC	12122	02-28-2013	394 S 4TH ST	no heat
CSC	12156	02-28-2013	523 ASH ST	no heat
CSC	12159	06-20-2013	950 AIRPORT RD SE	No heat emergency. Original WX August 2009; OLIEE and ARRA funds used.
CSC	12161	03-31-2013	30991 VAIL CREEK RD	no heat emergency
CSC	12162	04-30-2013	1283 44TH ST	No heat emergency. Previously weatherized Aug 2005. ECHO, LIHEAP used.
MCCAC	921	03-31-2013	1301 W 2ND ST	Client's had a mold problem,were not turning on Bathfan.Installed ASHRAE bathfans.H/S Installed blown fiberglass attic insulation to correct any displaced or

6bFigure 6-7B: Standard – Re Weatherization Report

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:36
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Health And Safety Job Costs

Version 3.1.7T

Select APC
OHCS-WX-WX ▾

Completion Date - From 01-01-2000 (mm-dd-yyyy)

Completion Date - To 05-01-2050 (mm-dd-yyyy)

Note: Reports will open in a new window.

Submit

NOTICE : This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-8A: [Standard - Health & Safety Job Costs Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Run Report’ button (reference *Figure 6-8A*). The report will then display containing the requested information (reference *Figure 6-8B*).

**Health & Safety Job Cost
OHCS-WX-WX
From 01/01/2000 To 05/01/2050**

ACCESS	# of HS Jobs	Total HS Cost	# of All Jobs*	Ave. Cost**
ARRA	0	0.00	0	0.00
BPA	11	8,535.52	11	775.96
DEP	10	8,213.69	10	821.37
DOE	12	8,669.67	12	722.47
ECHO	93	70,889.30	95	746.20
LANDLORD	1	720.36	1	720.36
LIHEAP	58	51,910.76	61	851.00
RELIANT	3	1,182.30	4	295.58
OTHER FUNDS	32	15,246.85	50	304.94
ACCESS	181	165,368.45	181	913.64

CAO	# of HS Jobs	Total HS Cost	# of All Jobs*	Ave. Cost**
ARRA	3	2,362.00	4	590.50
BPA	16	18,819.17	25	752.77
DEP	8	5,874.30	13	451.87
DOE	43	53,932.72	53	1,017.60
ECHO	246	327,074.60	356	918.75
LANDLORD	1	5,302.00	15	353.47
LIHEAP	176	202,883.24	379	535.31
RELIANT	22	3,591.87	24	149.66
OTHER FUNDS	5	2,119.65	25	84.79
CAO	380	621,959.55	464	1,340.43

CAPECO	# of HS Jobs	Total HS Cost	# of All Jobs*	Ave. Cost**
ARRA	0	0.00	0	0.00
BPA	12	6,639.19	14	474.23
DEP	14	14,958.78	19	787.30
DOE	10	4,844.56	16	302.78
ECHO	17	18,828.56	22	855.84
LANDLORD	0	0.00	0	0.00
LIHEAP	65	68,060.55	80	850.76
RELIANT	1	872.69	2	436.34
OTHER FUNDS	1	2,446.82	1	2,446.82
CAPECO	86	116,651.15	87	1,340.82

CAT	# of HS Jobs	Total HS Cost	# of All Jobs*	Ave. Cost**
ARRA	0	0.00	0	0.00
BPA	21	34,293.50	39	879.32
DEP	3	2,175.00	7	310.71
DOE	9	8,286.50	14	591.89
ECHO	10	11,806.00	12	983.83
LANDLORD	0	0.00	0	0.00
LIHEAP	33	54,015.61	44	1,227.63
RELIANT	1	750.00	2	375.00
OTHER FUNDS	8	5,127.80	10	512.78
CAT	64	116,454.41	84	1,386.36

CCN	# of HS Jobs	Total HS Cost	# of All Jobs*	Ave. Cost**
ARRA	0	0.00	0	0.00

* The total of all agency jobs need not be a sum of the grant jobs because they are distinct counts.

** Average Cost is calculated as Health & Safety Costs / Count of all jobs (not just H&S jobs)

July 06, 2015

12:43:00 PM

Version 1.1

Data Classification: 1

Figure 6-8B: Standard - Health & Safety Job Costs Report

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:51

Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Standard
Historical

Furnace Replacement

Select APC
OHCS-WX-WX ▾*

Completion Date - From 01-01-2000 (mm-dd-yyyy)

Completion Date - To 05-01-2050 (mm-dd-yyyy)

Note: Reports will open in a new window.

Submit

NOTICE : This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-9A: [Furnace Replacement Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Run Report’ button (reference *Figure 6-9A*). The report will then display containing the requested information (reference *Figure 6-9B*).

**Furnace Replacement
OHCS-WX-WX
From 01/01/2000 To 05/01/2050**

	<u># of Jobs</u>
ACCESS	15
CAO	164
CAPECO	8
CAT	19
CCN	15
CCSSD	13
CINA	4
CSC	81
HACSA	19
MCCAC	2
MULTCO	15
MWVCAA	33
NIMPACT	10
OHDC	2
ORCCA	6
UCAN	2
YCAP	11
	<hr/> <hr/> 419

July 06, 2015

12:47:31 PM

Version 1.0 wx_furnace_replacement.xml.rpt

Data Classification: 1

Figure 6-9B: Furnace Replacement Report

Agency: OHCS User: TESTUSER Timeout: 19:28 Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

SHPO Report

Version 3.1.7T

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
OHCS-WX-WX ▾*

Completion Date - From 01-01-2000 * (mm-dd-yyyy)

Completion Date - To 05-01-2050 * (mm-dd-yyyy)

Note: Reports will open in a new window.

NOTICE : This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-10A: [Standard – SHPO Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Submit’ button (*reference Figure 6-10A*). The report will then display containing the requested information (*reference Figure 6-10B*).

OHCS/SHPO PROGRAMMATIC AGREEMENT - EXEMPT PROJECTS

OHCS-WX-WX: Completion Date From 01/01/2000 to 05/01/2050

JOB #	COMPLETION DATE	ADDRESS	COUNTY	YEAR BUILT	PROJECT DESCRIPTION
11-38-UC	10-10-2012	1220 U AVE, LA GRANDE	UNION	1888	Floor Insulation, Air Infiltration, H&S - Other, Furnace Repl - HS: Furnace repair h&s: was paid out of Avista Rebate funding.
11743	04-18-2013	7355 7TH ST SE, TURNER	MARION	1961	Water Heater health & Safety: was paid out of LIHEAP WX FY12 Ceiling Insulation, Floor Insulation, Wall Insulation, H&S - Other, H&S - Ashrae, Client Ed: H & S was to repair heat system, thermostat.
11746	02-07-2013	4490 STATE ST, SALEM	MARION	1955	Air Infiltration, H&S - Ashrae, Client Ed: \$1390 paid to ORR Insulation for installation of bath and kitchen fans.--CDM 2.7.13
11751	04-18-2013	1156 25TH ST NE, SALEM	MARION	1948	Ceiling Insulation, Floor Insulation, Wall Insulation, Duct Insulation, Duct Sealing, H&S - Other, H&S - Ashrae: Health & Safety to service gas furnace. Health & Safety ASHRAE for installation of bath fan and switch.--CDM 4.18.13
11795	03-31-2014	21507 CASE RD NE, AURORA	MARION	1910	Floor Insulation, Air Infiltration, H&S - Other, H&S - Ashrae, Client Ed, Baseload, Other: Other is for Audit and Inspection. Health and Safety Ashrae for fan installation to meet Ashrae 62.2. Health and Safety for installation of CO monitor...cdm 3.31.14
11801	05-20-2013	815 E MAIN ST, SILVERTON	MARION	1917	H&S - Other: Other funds was for Smoke and CO alarm and No heat insp.
11807	02-11-2014	3585 HAWTHORNE AVE SE, SALEM	MARION	1949	Ceiling Insulation, Wall Insulation, Air Infiltration, H&S - Other, H&S - Ashrae, Other: Other is for Audit and Inspection, Health and Safety Ashrae for fan installation to meet Ashrae 62.2. Health and Safety for installation of CO monitor...cdm 2.11.14
11815	09-23-2013	1440 THOMPSON, WOODBURN	MARION	1963	Ceiling Insulation, Floor Insulation, Air Infiltration, H&S - Other, H&S - Ashrae, Client Ed, Baseload, Other: Other is for audit and inspection. Health and Safety Ashrae for fan installation to meet Ashrae 62.2.
11821	11-26-2013	4423 DURBIN AVE SE, SALEM	MARION	1960	Ceiling Insulation, Floor Insulation, Duct Insulation, Duct Sealing, Air Infiltration, H&S - Other, H&S - Ashrae, Client Ed, Other: Other is for Audit and Inspection. Health and Safety Ashrae for fan installation to meet Ashrae 62.2. Health and Safety for installation of CO monitor...cdm 11.26.13
11823	02-11-2014	2239 MILL ST SE, SALEM	MARION	1946	Ceiling Insulation, Floor Insulation, Wall Insulation, Duct Sealing, Air Infiltration, H&S - Other, H&S - Ashrae, Other: Other is for Audit and Inspection. Health and Safety Ashrae for fan installation to meet Ashrae 62.2. Health and Safety for installation of CO monitor
11828	03-25-2013	288 44TH AVE NE, SALEM	MARION	1961	Furnace Repair:
11838	06-24-2013	3073 STORTZ AVE NE, SALEM	MARION	1963	Furnace Repl - HS: Furnace replacement needed as the previous one was not working.
11853	09-19-2013	1625 4TH ST NE, SALEM	MARION	1949	Ceiling Insulation, Floor Insulation, Air Infiltration, H&S - Other, H&S - Ashrae, Client Ed, Baseload, Other: H & S-Ashrae is to meet 62.2, other is for audit and inspection, H & S is for Carbon Monoxide installation

7/6/15 12:47:53 PM

SHPO Report 1.2

Page 1 of 25

Data Classification: 3

Figure 6-10B: Standard – SHPO Report

OPUS
Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:37
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Energy Type Labels

Version 3.1.7T

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
OHCS-WX-WX *

Completion Date - From 01-01-2000 * (mm-dd-yyyy)

Completion Date - To 05-01-2050 * (mm-dd-yyyy)

Select Energy Type
ELECTRIC
NATURAL GAS
OIL
OTHER
PROPANE
WOOD

Select Report Type: *
 Labels (Avery 5160)
 Export

Note: Reports will open in a new window.

Submit

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-11A: [Standard – Energy Type Labels Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To, Energy Type), Select Report Type (Labels or Export) and Click on the ‘Submit’ button (reference Figure 6-11A). The report will then display containing the requested information (reference Figure 6-11B).

JOSEPHINE BLOFISH
100 N ELM ST
STAYTON, OR 97383

BARBARA BUSH
100 S MAIN ST
SILETZ, OR 97380

JOHN SMYTH
55555 OLIVE ST
MADRAS, OR 97741

KURN SON-OF-MOGH
1701-D USS ENTERPRISE UNIT 10
EUGENE, OR 97401

Figure 6-11B: Standard – Energy Type Labels

OPUS
Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 18:22
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Zip Code Labels

Standard
Historical

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
OHCS-WX-WX ▾*

Completion Date - From 01-01-2000 * (mm-dd-yyyy)

Completion Date - To 05-01-2050 * (mm-dd-yyyy)

Zip Code	Available	Selected
	97824	97005
	97825	97017
	97826	97828
	97827	

Select Report Type:*

Labels (Avery 5160)
 Export

Note: Reports will open in a new window.

Submit

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-12A: [Standard – Zip Code Labels Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To). Choose the desired Zip Codes for the Available and move to the selected area. Select Report Type (Labels or Export) and Click on the ‘Submit’ button (*reference Figure 6-12A*). The report will then display containing the requested information (*reference Figure 6-12B*).

JAMES KIRK
1701 ENTERPRISE STE 10F
ENTERPRISE, OR 97828

KURN SON-OF-MOGH
1701-D USS ENTERPRISE UNIT 10
EUGENE, OR 97401

Figure 6-12B: Standard – Zip Code Labels

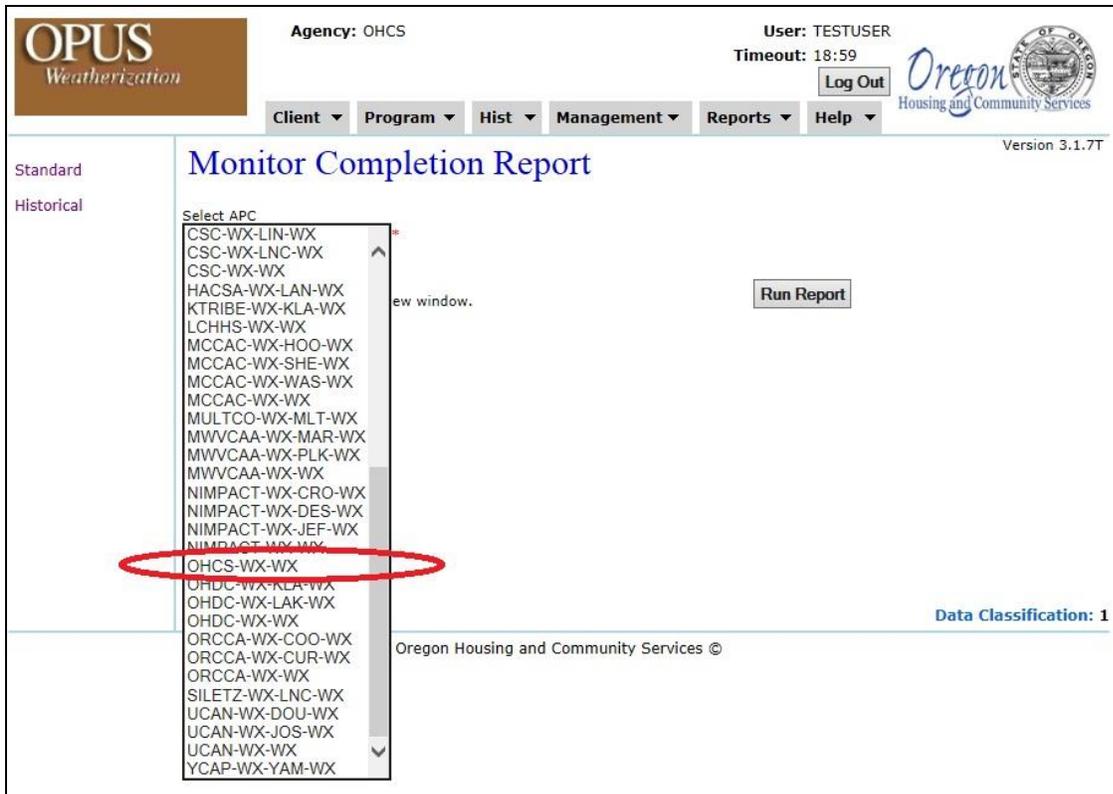


Figure 6-13A: [Monitor Completion Report Screen](#) – APC Dropdown

Select the desired APC from dropdown (*reference Figure 6-13A*). Select Completion Date – From, Completion Date – To and Click on the ‘Run Report’ button (*reference Figure 6-13B*).



Figure 6-13B: Monitor Completion Report Screen – Completion Date From To

The report will then display containing the requested information (*reference Figure 6-13C*).

DRAFT

Figure 6-13C: Monitor Completion Report

The screenshot shows the 'WX Residence Change Report' interface. At the top left is the 'OPUS Weatherization' logo. The top right shows 'Agency: OHCS', 'User: TESTUSER', and 'Timeout: 19:43'. A 'Log Out' button is present. Below the header is a navigation menu with 'Client', 'Program', 'Hist', 'Management', 'Reports', and 'Help'. The main content area has a left sidebar with 'Standard' and 'Historical' options. The title 'WX Residence Change Report' is centered at the top of the main area. Below the title are two checked checkboxes: 'Valid APC's only' and 'Restrict Residence Edit Date to Intake Date Range'. There are two 'Completion Date' fields, each with a calendar icon and '(mm-dd-yyyy)' placeholder. A 'Submit' button is on the right. A 'Notice' box states: 'Notice: Reports to data is available for APC's older than 2011.' Another notice box says: 'NOTICE: This page may take several minutes to run. It may appear locked or frozen. Please do not hit the refresh button on this page to increase.' A large dropdown menu is open, listing various APC codes such as 'ACCESS-WX-JAC-WX', 'CAO-WX-WSH-WX', 'CAPECO-WX-GIL-WX', etc. The bottom right corner shows 'Data Classification: 2' and 'Oregon Housing and Community Services ©'.

Figure 6-14A: [Wx Residence Change Report Screen](#) – APC Dropdown

Select the desired APC from the dropdown (*reference Figure 6-14A*). Select Completion Date – From, Completion Date – To and click ‘Submit’ button (*reference Figure 6-14B*).

OPUS Weatherization

Agency: OHCS

User: TESTUSER

Timeout: 19:43

Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

WX Residence Change Report

Standard
Historical

Valid APC's only

Restrict Residence Edit Date to Intake Date Range

APC: OHCS-WX-WX

Completion Date - From: 01-01-2000 (mm-dd-yyyy)

Completion Date - To: 05-01-2050 (mm-dd-yyyy)

Note: Reports will open in a new window. No data is available for APC's older than 2011.

Submit

NOTICE : This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Data Classification: 2

Oregon Housing and Community Services ©

Figure 6-14B: Wx Residence Change - Completion Date: FROM and Completion Date: TO

The report will then display containing the requested information (*reference Figure 6-14C*).

NOTE: This report may take up to 10 minutes to run. It may appear locked or frozen. Please do not hit the refresh button on your browser as this will cause your wait time to increase.

Residence Change Report

OHCS-WX-WX

01/01/2000 - 05/01/2050

Both Intake Date and Last Residence Edit are restricted to Input Date Range

Auth #	Applicant	Current Address	Prior Address	Intake Worker	Last Edit
82063	██████████	17680 SW DECLARATIONWAY SPC 440	1615 E MAIN ST	SVILLAFANA	01/14/2013
Auth #	Applicant	Current Address	Prior Address	Intake Worker	Last Edit
11165	██████████	1025 S 6TH ST SPC 59	1025 6TH ST S SPC 59	KSTROUD	11/19/2012
Auth #	Applicant	Current Address	Prior Address	Intake Worker	Last Edit
R000206	██████████	1085 W 1ST ST SPC 3	1085 W 1ST AVE # 3	SNEFF	01/25/2013
Auth #	Applicant	Current Address	Prior Address	Intake Worker	Last Edit
11875	██████████	753 NE ARLETA PL NE	20814 NE SIERRA DR APT 13	CMARTIN	05/13/2013

Data Classification:

Page 1 of 1

wx_residence_change_lect.rpt 1.0

12:51:38 PM

July 06, 2015

Figure 6-14C: Wx Residence Change - Completion Date: FROM and Completion Date: TO

Agency: OHCS User: TESTUSER Timeout: 17:27 Log Out Oregon Housing and Community Services

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾ Version 3.1.7T

Standard
Historical

WX Referral Report

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC

- MWVCAA-GAP 2014-MAR-MWVCAA - GAP 2014
- MWVCAA-GAP 2014-MWVCAA - GAP 2014
- MWVCAA-GAP 2014-PLK-MWVCAA - GAP 2014
- MWVCAA-LP09-LIHEAP 2009
- MWVCAA-LP09-MAR-LIHEAP 2009
- MWVCAA-LP09-PLK-LIHEAP 2009
- MWVCAA-LP10-LIHEAP 2010
- MWVCAA-LP10-MAR-LIHEAP 2010
- MWVCAA-LP10-PLK-LIHEAP 2010
- MWVCAA-LP11-LIHEAP 2011
- MWVCAA-LP11-MAR-LIHEAP 2011
- MWVCAA-LP11-PLK-LIHEAP 2011
- MWVCAA-LP12-LIHEAP 2012
- MWVCAA-LP12-MAR-LIHEAP 2012
- MWVCAA-LP12-PLK-LIHEAP 2012
- MWVCAA-LP13-LIHEAP 2013**
- MWVCAA-LP13-MAR-LIHEAP 2013
- MWVCAA-LP13-PLK-LIHEAP 2013
- MWVCAA-LP14-LIHEAP 2014
- MWVCAA-LP14-MAR-LIHEAP 2014
- MWVCAA-LP14-PLK-LIHEAP 2014
- MWVCAA-LP15-LIHEAP 14B-15
- MWVCAA-LP15-MAR-LIHEAP 14B-15
- MWVCAA-LP15-PLK-LIHEAP 14B-15
- MWVCAA-LPLV10-LIHEAP 2009 LEVERAGE
- MWVCAA-LPLV10-MAR-LIHEAP 2009 LEVERAGE
- MWVCAA-LPLV10-PLK-LIHEAP 2009 LEVERAGE
- MWVCAA-LPLV11-LIHEAP LEVERAGE 2010
- MWVCAA-LPLV11-MAR-LIHEAP LEVERAGE 2010
- MWVCAA-LPLV11-PLK-LIHEAP LEVERAGE 2010

Submit

Data Classification: 1

Figure 6-15A: [Wx Referral Report Screen](#) – APC Dropdown

Select the APC from the dropdown list (*reference Figure 6-15A*), once this accomplished the Completion Date – From and Completion Date – To field will appear (*reference Figure 6-15B*).

Agency: OHCS User: TESTUSER Timeout: 19:22 Log Out Oregon Housing and Community Services

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾ Version 3.1.7T

Standard
Historical

WX Referral Report

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

Select APC
MWVCAA-LP13-LIHEAP 2013 ▾*

Completion Date - From 10-01-2012 * (mm-dd-yyyy)

Completion Date - To 09-30-2013 * (mm-dd-yyyy)

Additional Report Options

* Select Report Type:	* Select Sort Option: (For Standard Report only)		
<input checked="" type="radio"/> Standard Report	<input checked="" type="radio"/> Last Name	<input type="radio"/> Heat Type	<input type="radio"/> Residence Type
<input type="radio"/> Labels (Avery 5160)	<input type="radio"/> Vendor	<input type="radio"/> City	<input type="radio"/> Zip Code

Note: Reports will open in a new window. Also, labels are only sorted by last name.

Submit

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-15B: Wx Referral Report Screen – Completion Date – From, Completion Date – To and Sort.

Enter the Completion – From and Completion Date – To fields, then select the desired sort option (*reference Figure 6-15B*). The desired report will open in a new window (*reference figures 5-18C*).

Weatherization List

to
Sorted by Last Name

Applicant	Street Address	Vendor Name	Phone #	Heat Type	Residence Type
[REDACTED]	5422 PORTLAND RD NE SALEM, OR 97305	SALEM ELECTRIC	(541) 409-3438	ELECTRIC	Multi-Unit (Over 4)

July 06, 2015 1:07 pm

Version 9.0 WXList.rpt

Page 1 of 1

Data Classification:

Figure 6-15C: Wx Referral Report

4. Click on the desired report link and the appropriate input screen will appear.



Figure 6-16: [Historical Reports Screen](#)

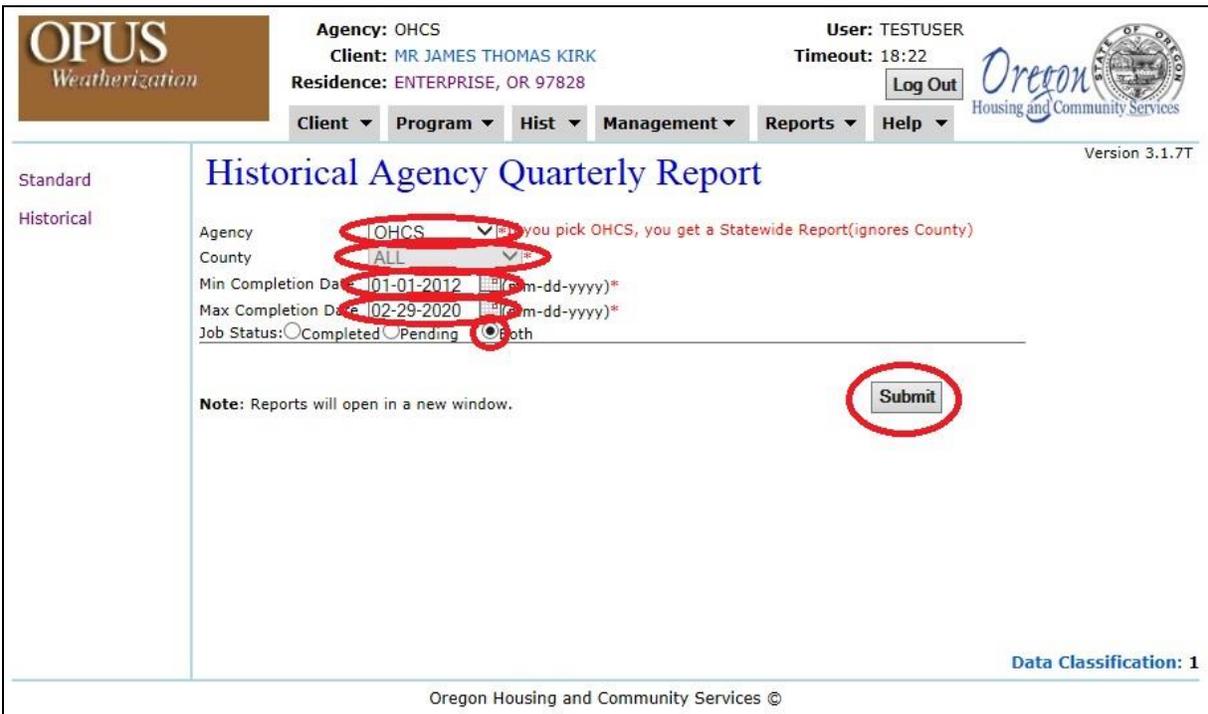


Figure 6-17A: [Historical – Quarterly Report Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To, Job Status) and Click on the ‘Submit’ button (reference Figure 6-17A). The report will then display containing the requested information (reference Figure 6-17B).

HISTORICAL WX QUARTERLY REPORT

AGENCY: OHCS

COUNTY: ALL

REPORT FROM 01-01-2012 **TO** 02-29-2020

PENDING: BOTH

GRANT: WX UN DUPED

FUEL TYPE COUNT

Electric: 1,918 Natural Gas: 449 Propane 22
Oil: 32 Wood: 42 Other: 10

TOTALS	
Total Energy Savings in BTU's	48,663,642,698
OWNER Single Family Stick Units	520
RENTER Single Family Stick Units	211
MOBILE Owner Units	649
MOBILE Renter Units	76
Multi-Family Units	844
SHELTER Units (800 sq. ft. = 1 unit)	87
DUPLEX Units	49
TRIPLEX Units	7
FOURPLEX Units	30
Total Furnace Replacements	422
Baseload Only Units (Baseload Only BTUS)	111 (306,843,339)
Weatherization Units	2,359
Re-Weatherization Units	3
TOTAL Units	2,473
Health and Safety Units	1,589
Total Units with FARMWORKER	39
Total Units with ELDERLY	754
Total Units with Children Under 6	484
Total Units with Handicapped person(s)	692
Total Units with Native American person(s)	72
Total PEOPLE Served (total of all household members)	5,838
Total # of ELDERLY Served	919
Total # of CHILDREN Under 6 Served	696
Total # of HANDICAPPED Served	852
Total # of FARMWORKERS Served	52
Total # of NATIVE AMERICANS Served	196
Total # of HISPANICS Served	1,312
Total # of African Americans Served	59
Total # of ASIANS Served	46

Date Printed: 5/26/15 12:23:32 PM

Rev. 2.1

Page 1 of 18

Data Classification: 1

Figure 6-17B: Historical – Quarterly Report

NOTE: First page of Quarterly report is a rollup. Following pages breakdown by individual grants

OPUS Weatherization

Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:26
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Historical Grant Costs Report

Version 3.1.7T

Agency: NIMPACT ▾
Min Completion Date: 01-01-2012 [calendar icon] (mm-dd-yyyy)*
Max Completion Date: 07-30-2020 [calendar icon] (mm-dd-yyyy)*
Job Status: Completed Pending Both

Note: Reports will open in a new window.

Run Report

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-18A: [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 6-18A*). The report will then display containing the requested information (*reference Figure 6-18B*).

Historical Grant Costs for NIMPACT
From 1/1/12 To 7/30/20
Pending:Both

GRANT: WX DOE	Job #	Grant Cost	Agency
	021911	\$ 3,971.13	NIMPACT
	091311	\$ 2,472.62	NIMPACT
	190858	\$ 2,466.26	NIMPACT
	190904	\$ 2,691.24	NIMPACT
	210711	\$ 1,094.46	NIMPACT
	212811	\$ 131.25	NIMPACT
	266611	\$ 247.50	NIMPACT
	336711	\$ 180.00	NIMPACT
	377111	\$ 12,350.32	NIMPACT
	442511	\$ 316.85	NIMPACT
	503011	\$ 6,307.26	NIMPACT
	516311	\$ 2,432.46	NIMPACT
	542211	\$ 6,888.95	NIMPACT
	564912	\$ 5,920.12	NIMPACT
	581211	\$ 1,400.00	NIMPACT
	584111	\$ 2,221.29	NIMPACT
	623711	\$ 4,113.85	NIMPACT
	627112	\$ 75.00	NIMPACT
	643612	\$ 2,010.00	NIMPACT
	654111	\$ 2,669.53	NIMPACT
	669711	\$ 771.29	NIMPACT
	681811	\$ 2,113.46	NIMPACT
	697311	\$ 2,471.36	NIMPACT
	728012	\$ 7,855.91	NIMPACT
	770411	\$ 5,597.16	NIMPACT
	783011	\$ 4,093.06	NIMPACT
	875011	\$ 150.00	NIMPACT
	980811	\$ 5,364.98	NIMPACT
	994211	\$ 4,033.39	NIMPACT
		\$ 92,410.70	

Figure 6-18B: Historical – Grants Cost

OPUS
 Weatherization

Agency: OHCS
Client: MR JAMES THOMAS KIRK
Residence: ENTERPRISE, OR 97828

User: TESTUSER
Timeout: 19:25
 Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
 Historical

Historical Re-Weatherization Report

Version 3.1.7T

Agency: OHCS
 Job Date From: 02-21-2012 (mm-dd-yyyy)*
 Job Date To: 07-30-2020 (mm-dd-yyyy)*

Note: Reports will open in a new window.

Run Report

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-19A: [Historical – Re-Weatherization Report Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Run Report’ button (*reference Figure 6-19A*). The report will then display containing the requested information (*reference Figure 6-19B*).

Historical Re - Weatherized

Agency: OHCS

From: 02-21-2012 To: 07-30-2020

<u>Agency</u>	<u>Job#</u>	<u>Completion Date</u>	<u>Street Address</u>
CCN	12-20-BC/S	05-14-2012	305 4TH ST
CCSSD	11-128	03-29-2012	41204 SE TUMALA MT RD

Date Printed: 5/26/15 12:40:56 PM

Rev. 1.0

Page 1 of 1

Data Classification: 1

Figure 6-19B: Historical – ReWeatherization Report

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:33
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Standard
Historical

Historical Health And Safety Job Costs

Version 3.1.7T

Select Agency: OHCS

Min Completion Date: 01-01-2012 (mm-dd-yyyy)*

Max Completion Date: 07-30-2020 (mm-dd-yyyy)*

Note: Reports will open in a new window.

Run Report

Data Classification: 1

Oregon Housing and Community Services ©

Figure 6-20A: [Historical – Health & Safety Job Costs Report Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Run Report’ button (*reference Figure 6-20A*). The report will then display containing the requested information (*reference Figure 6-20B*).

Historical Health & Safety Job Cost
From 01/01/2012 To 07/30/2020

<u>ACCESS</u>	<u># of HS Jobs</u>	<u>Total HS Cost</u>	<u># of All Jobs*</u>	<u>Ave. Cost**</u>
ARRA DOE	60	58,825.37	63	933.74
WX BPA	5	3,998.05	7	571.15
WX DOE	25	21,599.47	26	830.75
WX ECHO-PPL	31	27,131.87	36	753.66
WX LIEAP 2011	4	1,698.30	6	283.05
WX LIEAP 2012	8	6,778.35	17	398.73
WX OTHER FUNDS	20	17,523.10	44	398.25
WX SERC	1	150.00	18	8.33
	<u>110</u>	<u>137,704.51</u>	<u>115</u>	<u>1,197.43</u>
CAO				
<u>CAO</u>	<u># of HS Jobs</u>	<u>Total HS Cost</u>	<u># of All Jobs*</u>	<u>Ave. Cost**</u>
ARRA DOE	166	166,437.26	185	899.66
WX BPA	0	0.00	10	0.00
WX DOE	23	39,385.24	29	1,358.11
WX ECHO	74	20,045.93	159	126.08
WX ECHO-PGE	0	0.00	176	0.00
WX LIEAP 2010	14	3,364.39	35	96.13
WX LIEAP 2011	7	3,418.06	11	310.73
WX LIEAP 2012	100	16,826.46	187	89.98
WX LIEAP-NA 2008	1	80.00	1	80.00
WX OTHER FUNDS	24	1,920.00	68	28.24
	<u>251</u>	<u>251,477.34</u>	<u>323</u>	<u>778.57</u>
CAPECO				
<u>CAPECO</u>	<u># of HS Jobs</u>	<u>Total HS Cost</u>	<u># of All Jobs*</u>	<u>Ave. Cost**</u>
ARRA DOE	26	49,283.50	32	1,540.11
WX BPA	5	4,872.56	6	812.09
WX DOE	12	14,202.00	12	1,183.50
WX ECHO-PPL	2	2,335.23	4	583.81
WX LIEAP 2010	4	237.37	4	59.34
WX LIEAP 2011	6	9,498.19	7	1,356.88
WX LIEAP 2012	6	7,435.99	32	232.37
	<u>46</u>	<u>87,864.84</u>	<u>48</u>	<u>1,830.52</u>
CAT				
<u>CAT</u>	<u># of HS Jobs</u>	<u>Total HS Cost</u>	<u># of All Jobs*</u>	<u>Ave. Cost**</u>
ARRA DOE	12	11,447.00	32	357.72
WX BPA	1	700.00	2	350.00
WX DOE	0	0.00	8	0.00
WX ECHO	0	0.00	2	0.00
WX LIEAP 2010	2	107.94	2	53.97
WX LIEAP 2011	0	0.00	1	0.00
WX LIEAP 2012	11	16,152.60	18	897.37
WX OTHER FUNDS	8	6,989.00	19	367.84
	<u>30</u>	<u>35,396.54</u>	<u>45</u>	<u>786.59</u>
CCN				
<u>CCN</u>	<u># of HS Jobs</u>	<u>Total HS Cost</u>	<u># of All Jobs*</u>	<u>Ave. Cost**</u>
ARRA DOE	49	22,387.14	71	315.31
WX BPA	3	2,546.01	8	318.25
WX DEP 2007	0	0.00	1	0.00
WX DOE	3	706.00	7	100.86
WX ECHO-PPL	2	190.00	2	95.00
WX LIEAP 2011	1	194.00	8	24.25

* The total of all agency jobs need not be a sum of the grant jobs because they are distinct counts.

** Average Cost is calculated as Health & Safety Costs / Count of all jobs (not just H&S jobs)

May 27, 2015

7:14:38 AM

Version 1.1 hs_job_costs.xml.rpt

Data Classification: 1

Figure 6-20B: Historical – Health & Safety Job Costs Report



Figure 6-21A: [Historical – Furnace Replacement Report Screen](#)

Select the require information (i.e. Select APC, Completion Date – From, Completion Date – To) and Click on the ‘Run Report’ button (*reference Figure 6-21A*). The report will then display containing the requested information (*reference Figure 6-21B*).

Historical Furnace Replacement
From 01/01/2012 To 07/30/2020

	<u># of Jobs</u>
ACCESS	21
CAO	100
CAPECO	13
CAT	2
CCN	24
CCSSD	11
CINA	15
CSC	166
HACSA	3
MWVCAA	29
NIMPACT	18
OHDC	4
ORCCA	1
UCAN	5
YCAP	6
	<hr/> <hr/> 418

May 27, 2015

7:18:52 AM

Version 1.1 furnace_replacement.xml.rpt

Data Classification: 1

Figure 6-21B: Historical – Furnace Replacement Report

Section M1

Agency Management Functions

Program coordinators and managers will learn how to use the management screens: Agency, Program, Grant, APC and User. Most screens are processes that involve setting up programs funded thru OHCS, local programs which are temporary local programs, or agency match funds that are used to assist low income families.

<u>Agency</u>				218
<u>Program</u>				219
<u>APC</u>	<u>A</u>gency	<u>P</u>rogram	<u>C</u>ounty	219
Kit Components				220
	<u>Agency Kit Search</u>			220
	<u>Agency Kit New</u>			223
	<u>Agency Kit View</u>			225
User				229
	<u>Search</u>			229
	<u>Possible Disabled User-Reactivating Inactive User</u>			232
	<u>New</u>			234
	<u>View</u>			235
	<u>User Role Edit</u>			236
	<u>User Action Edit</u>			237
	<u>Disable User</u>			239
	<u>Reset User Password</u>			240

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

Agency Screens

The 'Agency Management' screen functions are not available in the OPUS Weatherization Module to Add, Delete or Edit agency information contact the OPUS Helpdesk at opushelp@hcs.state.or.us. Include the following minimum information with your request.

NEW AGENCY INFORMATION WORKSHEET					
NEW	<input type="checkbox"/>	CHANGE	<input type="checkbox"/>	DEACTIVATE	<input type="checkbox"/>
1. Agency Name: _____					
2. Tax Payers ID# _____					
3. Subrecipient YES _____ NO _____					
If YES Subrecipient to which agency _____					
4. Contact Information					
Telephone Number: _____					
Fax Number: _____					
5. Physical Address					
Street Address (No P.O. Boxes): _____					
City: _____					
State: <u>Oregon</u>					
Zip Code: _____					
6. Mailing Address					
Street Address: _____					
City: _____					
State: _____					
Zip Code: _____					

Figure 7-1: New Agency Worksheet

Program Screens

The 'Program' screen functions are not available at this time in the OPUS Weatherization Module to Add, Delete or Edit programs contact the OPUS Helpdesk at opushelp@hcs.state.or.us. Include the following minimum information with your request.

PROGRAM / APC WORKSHEET	
All fields marked * are required	
PROGRAM	
* Name (ACRONYM+2 DIGITYEAR)	_____
* Code (e.g. WAP 12)	_____
EFFECTIVE DATE	
* Start Date (MMDDYYYY):	_____
* End Date (MMDDYYYY):	_____
Shared (Yes / No):	_____
PROGRAM YEAR	
* Federal Poverty Year	_____
* Oregon Median Income Year	_____
<u>APC = Agency/Program/County</u>	
* Agency	_____
County ⁽¹⁾	_____
* Program	_____
* Grant	_____
* Start Date (MMDDYYYY):	_____
* End Date (MMDDYYYY):	_____
REMARKS/COMMENTS	

(1) APC <i>without</i> a county denotes a 'Parent level' APC. APC <i>with</i> a county denotes the APC is a 'Child level' APC	

Figure 7-2: Program / APC Worksheet

Kit Screens

There are three types of 'Kit' screens: 'Search', 'New' and 'View'.

Agency Kit Search

The "Agency Kit Search" screen allows a manager and/or another user to search for kits that have already been created by there agency. Search results are limited to 500 rows/

Setup:

On the 'Message of the Day' screen.

1. Using the 'Main Menu', scroll the mouse over 'Management', down to and click 'Kit' (reference Figure 7-3). The 'Agency Kit Search' screen will appear next (reference Figure 7-4).

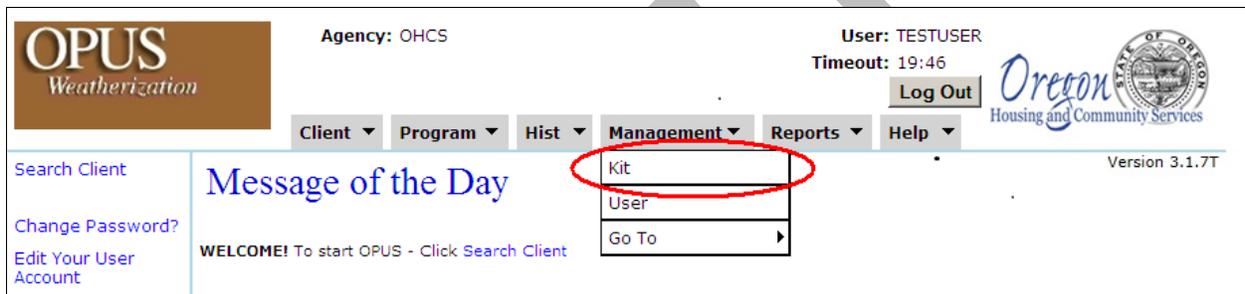


Figure 7-3: Kit Menu



Figure 7-4: Agency Kit Search screen.

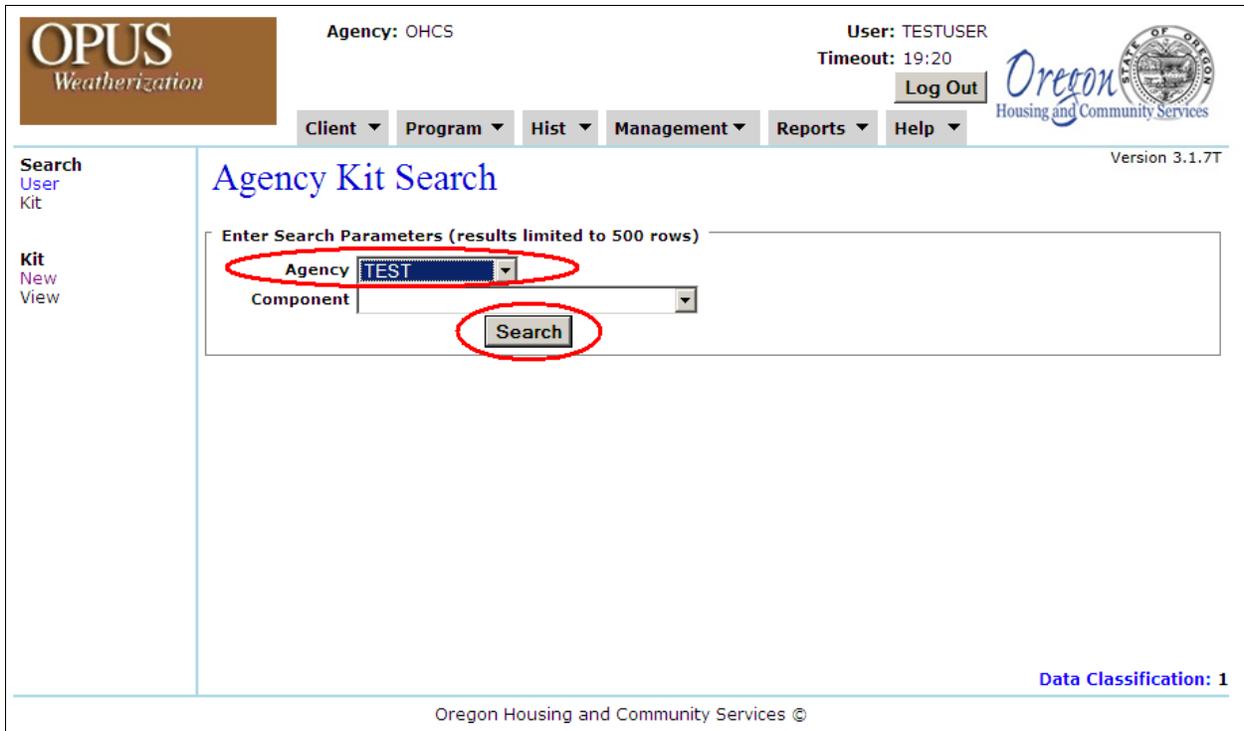


Figure 7-4A: Agency Kit Search screen – Search By Agency.

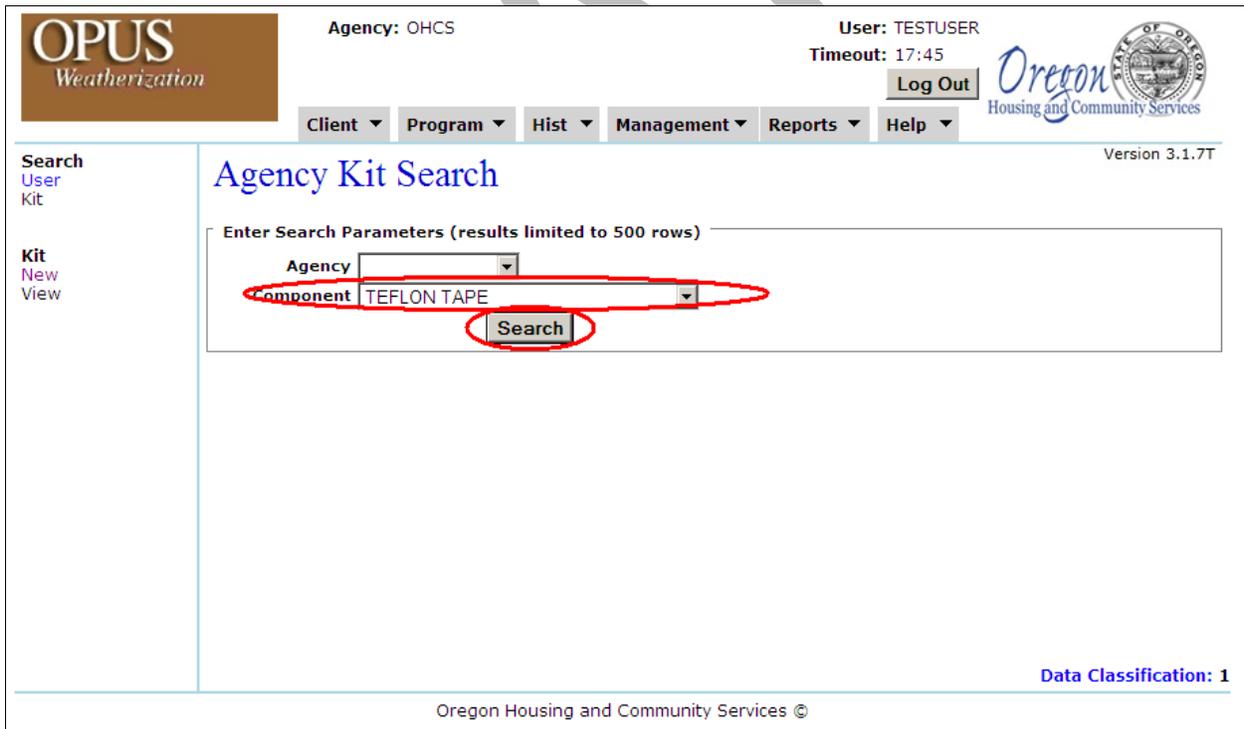


Figure 7-4B: Agency Kit Search screen – Search By Component

2. To search by 'Agency', use the drop-down arrow and select the appropriate agency and click 'Search' (reference Figure 7-4A). To search by 'Component' use the drop-down arrow and select the appropriate component and click 'Search' (reference Figure 7-4B).

A list of kits will appear in the ‘Search Results’. In the ‘Search Results’, Kits can be placed in alphabetical order by Kit Name, Component or Agency by clicking on the link(s) at the top of each column (reference Figure 7-5A).

Agency: OHCS User: TESTUSER Timeout: 19:10 Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Agency Kit Search

Enter Search Parameters (results limited to 500 rows)

Agency: TEST Component: [] Search

About Results:
Click [Kit Name](#) to **View Agency Kit** screen
If no results, you can create a [Add Kit](#).

Kit Name	Component	Agency
4A KIT WXX	AC/EVAPORATIVE COOLER COVER	TEST
WX TEST KIT	CFL	TEST
WX TEST KIT	DRIP GAUGE	TEST
WX TEST KIT	SHOWER TIMER-GAS	TEST

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-5A: Agency Kit Search screen – Search By Agency - Search Results screen.

Agency: OHCS User: TESTUSER Timeout: 19:54 Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Agency Kit Search

Enter Search Parameters (results limited to 500 rows)

Agency: [] Component: TEFLON TAPE Search

About Results:
Click [Kit Name](#) to **View Agency Kit** screen
If no results, you can create a [Add Kit](#).

Kit Name	Component	Agency
No matches		

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-5B: Agency Kit Search screen – Search By Component – No Matches.

3. If 'No Results' are given you have no kits matching the search criteria and you will need to create new kits [proceed to 'Agency Kit New' Section] otherwise from the results section click on the desired 'Kit Name' and the 'Agency Kit View' screen will appear next (reference Figure 7-8).

Agency Kit New

The "Agency Kit New" screen allows a manager and/or another user to create new kits utilizing pre-establish list of components.

Setup:

On the 'Agency Kit Search' screen.

Using the left Nav Bar, under 'Kit', click 'New' or select the 'Add Kit' button in the 'About Results' section if displayed (reference Figure 7-6). The 'Agency Kit New' screen will appear next (reference Figure 7-7).

The screenshot shows the 'Agency Kit Search' interface. At the top left is the 'OPUS Weatherization' logo. The header displays 'Agency: OHCS', 'User: TESTUSER', and 'Timeout: 19:54'. A 'Log Out' button is visible. Below the header are navigation tabs: Client, Program, Hist, Management, Reports, and Help. On the left, a sidebar menu has 'Search', 'User', and 'Kit' categories. Under 'Kit', 'New' and 'View' are listed, with 'New' circled in red. The main content area is titled 'Agency Kit Search' and includes a search form with 'Agency' and 'Component' dropdowns and a 'Search' button. Below the search form is an 'About Results' section with the text 'Click Kit Name to View Agency Kit screen' and 'If no results, you can create a' followed by an 'Add Kit' button, which is also circled in red. A 'Search Results' table is shown with columns for 'Kit Name', 'Component', and 'Agency', displaying 'No matches'. The footer includes 'Data Classification: 1' and 'Oregon Housing and Community Services ©'.

Figure 7-6: Agency Kit Search Screen.

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:23
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Search
User
Kit

Kit
New
View

Agency Kit New

Version 3.1.7T

Kit Information (Fields marked with * are required.)

Agency TEST *

Name 4A KIT WXX *

Save

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-7: Agency Kit New Screen.

Type of select (*all fields marked * are required*).

- Agency (from Drop Down Menu).
- Kit Name

Click the 'Save' button to save. The 'Agency Kit View' screen will appear next (*reference Figure 7-8*).

NOTE: You have created a new Agency Kit containing no components. For instructions on how to add components to kit proceed to 'Agency Kit Components' Section.

Agency Kit View

The 'Agency Kit View' screen allows a manager and/or another user to view, edit kit name and add or delete kit components next (*reference Figure 7-9*).

Setup:

On the 'Agency Kit Search' screen.

Select the desired kit under the 'Kit Name' column of the search results section next (*reference Figure 7-8*). 'The Kit View' will appear next (*reference Figure 7-9*).

The screenshot displays the 'Agency Kit Search' interface. At the top, it shows the OPUS Weatherization logo, the agency name 'OHCS', the user 'TESTUSER', and a timeout of 18:16. There is a 'Log Out' button and a navigation menu with options: Client, Program, Hist, Management, Reports, and Help. The version is 3.1.7T. The search parameters section includes a dropdown for 'Agency' set to 'TEST' and a text input for 'Component'. Below this is an 'About Results' section with instructions and an 'Add Kit' button. The 'Search Results' table has three columns: Kit Name, Component, and Agency. The first row, '4A KIT WXX', is circled in red. The table also lists 'WX TEST KIT' with components 'CFL', 'DRIP GAUGE', and 'SHOWER TIMER-GAS'. A 'Data Classification: 1' label is at the bottom right of the table area.

Kit Name	Component	Agency
4A KIT WXX	AC/EVAPORATIVE COOLER COVER	TEST
WX TEST KIT	CFL	TEST
WX TEST KIT	DRIP GAUGE	TEST
WX TEST KIT	SHOWER TIMER-GAS	TEST

Figure 7-8: Agency Kit Search screen.

Edit Kit Name

1. To Edit the Kit Name click the 'Edit' button (*reference Figure 7-9*). A text box containing the Kit Name will appear below the Kit Name allowing you to enter the new name (*reference Figure 7-10*).

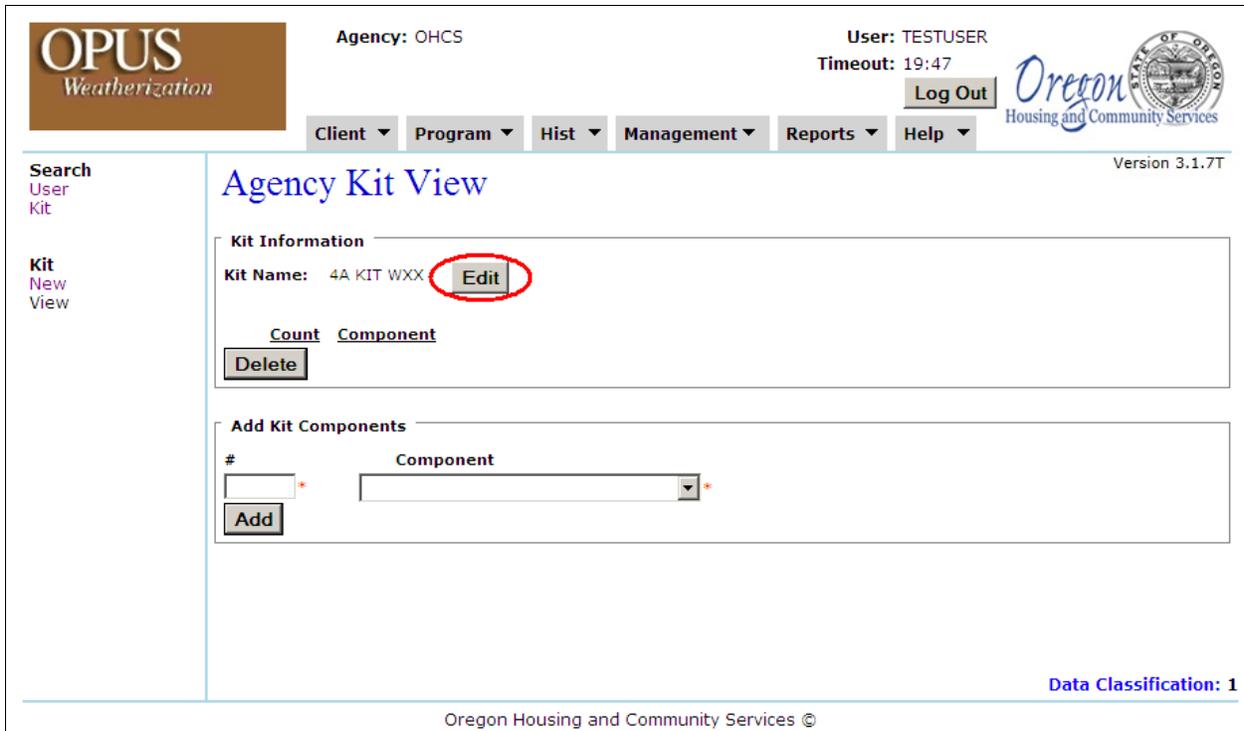


Figure 7-9: Agency Kit View screen.

2. Enter the new name a select the ‘Save’ button and kit name will be changed or selected ‘Cancel’ to stop the name from changing.



Figure 7-10: Agency Kit View screen – Edit Kit Name.

Add Kit Components

1. Enter the quantity of the desired component to be included in the kit.
2. Select from the 'Component' drop down menu the desired component.
3. Select the 'Add' button and the component with the indicated quantity will be added to the kit ((reference Figure 7-11)).

The screenshot displays the 'Agency Kit View' interface. At the top, it shows the agency name 'OHCS', the user 'TESTUSER', and the timeout '18:22'. There is a 'Log Out' button and a navigation menu with options: Client, Program, Hist, Management, Reports, and Help. The page title is 'Agency Kit View' and the version is '3.1.7T'. On the left, there are search and kit management options. The main content area is divided into two sections: 'Kit Information' and 'Add Kit Components'. The 'Kit Information' section shows 'Kit Name: 4A KIT WXX' with an 'Edit' button. Below it is a table with columns 'Count' and 'Component', and a 'Delete' button. The 'Add Kit Components' section has a table with columns '#', 'Component', and an 'Add' button. The 'Add' button and the 'Component' dropdown menu are circled in red. The dropdown menu is currently set to 'AC/EVAPORATIVE COOLER COVER'. The 'Count' field is set to '1'. At the bottom right, there is a 'Data Classification: 1' label and the copyright notice 'Oregon Housing and Community Services ©'.

Figure 7-11: Agency Kit View screen – Add Kit Components

Delete Kit Components

1. Select the check box preceding the component(s) you wish to delete from the kit.
2. Select the 'Delete' button and the selected component(s) will be deleted from the kit ((reference Figure 7-12)).



Agency: OHCS

User: TESTUSER
Timeout: 19:30

[Log Out](#)



Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

Search
User
Kit

Kit
New
View

Agency Kit View

Kit Information

Kit Name: 4A KIT WXX [Edit](#)

	Count	Component
<input type="checkbox"/>	1	AC/EVAPORATIVE COOLER COVER
<input type="checkbox"/>	2	AERATOR-ELECTRIC BATH
<input checked="" type="checkbox"/>	3	AERATOR-ELECTRIC KITCHEN
<input type="checkbox"/>	4	AERATOR-GAS KITCHEN

[Delete](#)

Add Kit Components

* Component *

[Add](#)

Data Classification: 1

Oregon Housing and Community Services ©

Figure 7-12: Agency Kit View screen – Delete Kit Components

User Screens

A manager sets up user accounts and roles (permissions) in the OPUS system for the agency staff. Staff roles and actions depend on what job functions are to be performed by individual working in OPUS. Some users will have minimum; view only access. Some users will need additional roles to process client intakes and/or reports. Some users will have additional roles for management functions. There are six types of ‘User’ screens: ‘Search’, ‘New’, ‘View’, ‘Edit’, ‘User Role Edit’ and ‘User Action Edit’.

User Search

The ‘User Search’ screen allows a manager and/or another user to search for a person who is registered in OPUS.

Setup:

On the ‘Message of the Day’ screen.

1. Using the ‘Main Menu’, scroll the mouse over ‘Management’, down to and click ‘User’ (reference Figure 7-13). The ‘User Search’ screen will appear next (reference Figure 7-14).

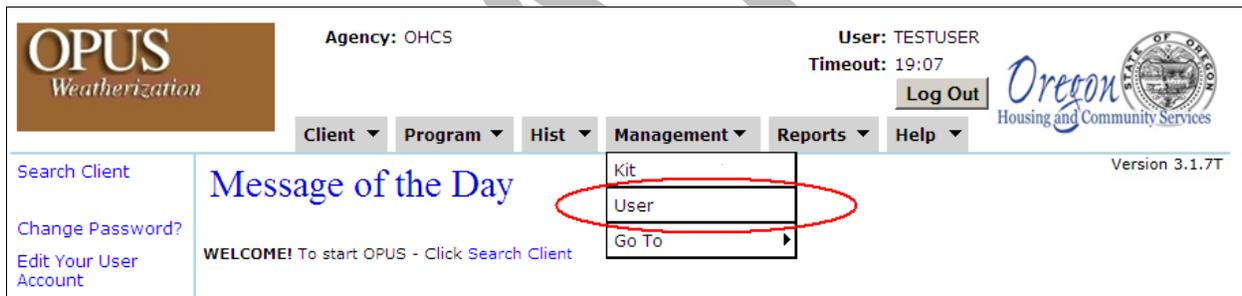


Figure 7-13: User Menu

2. Enter a user’s name or search by ‘Agency’. **Note:** Parent agencies have access to sub-agency staff within their structure. To search by ‘Agency’, use the drop-down arrow and select the appropriate agency and click ‘Search’. To search by user name, type in the first and/or last name then click ‘Search’.

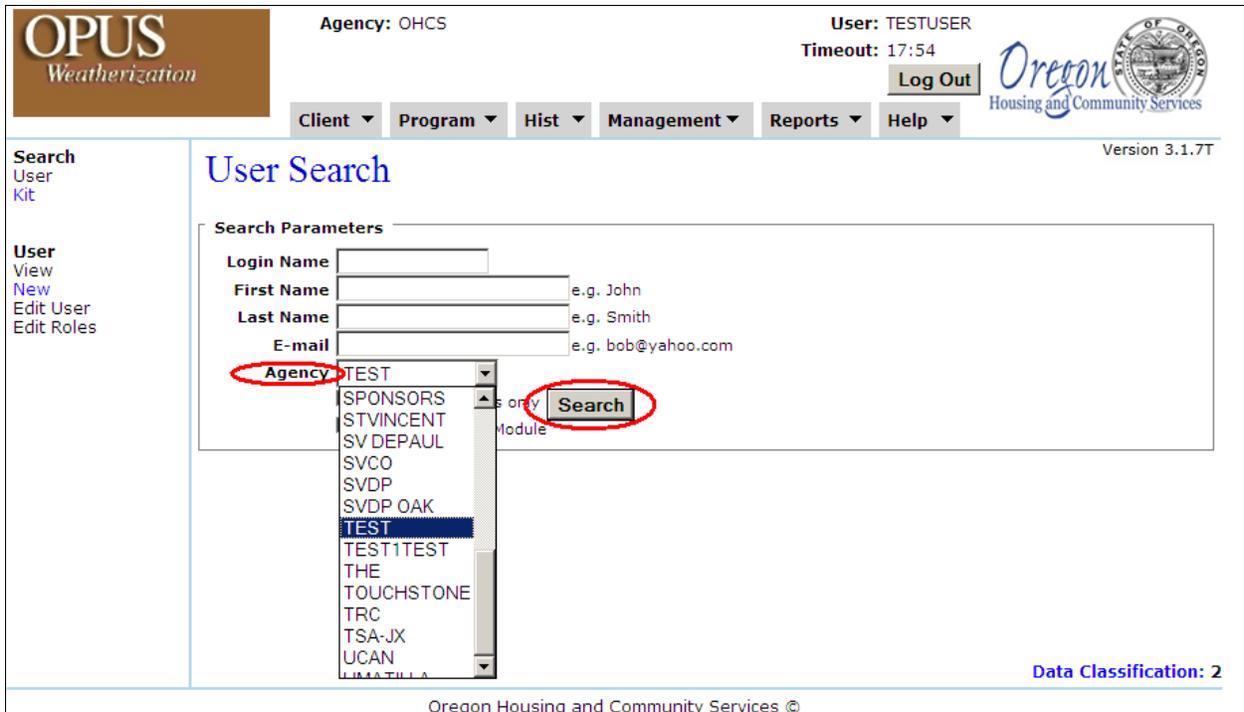


Figure 7-14: User Search by agency screen.

2. Enter a user's name or search by 'Agency'. **Note:** Parent agencies have access to sub-agency staff within their structure. To search by 'Agency', use the drop-down arrow and select the appropriate agency and click 'Search'. To search by user name, type in the first and/or last name then click 'Search'.

A list of staff members will appear in the 'Search Results'. In the 'Search Results', user names can be placed in alphabetical order by first name, last name or login name by clicking on the link(s) (reference Figure 7-15).

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 19:26 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.1.7T

User Search

Search Parameters

Login Name
 First Name e.g. John
 Last Name e.g. Smith
 E-mail e.g. bob@yahoo.com
 Agency TEST
 Show Active Users only
 w/ Rights to This Module

If no results, you can create a

Search Results

First Name	Last Name	Login Name	E-mail	Agency Name
RONALD	TOUB	Login names have been blocked	ronald.toub@state.or.us	OHCS
BRENT	HOLMES		brent.holmes@hcs.state.or.us	OHCS
KERRI	HAWORTH		Kerri.Haworth@state.or.us	OHCS
BRENT	HOLMES		brentholmes2@gmail.com	OHCS
EARL	RUTLEDGE		john.rutledge@state.or.us	OHCS
CHRISTOPHER	SHOOPMAN		chris.shoopman@state.or.us	OHCS
LIEM	NGO		liem.ngo@state.or.us	OHCS
JAMES	MCDONALD		James.mcdonald@hcs.state.or.us	OHCS

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-15: User Search with Search Results screen.

3. Click on a name to see 'User View' screen. The 'User View' screen allows a manager to view an individual user's roles (reference Figure 7-16).

OPUS
Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:26
Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Search
User
Kit

User
View
New
Edit User
Edit Roles

User View

Version 3.1.7T

User Details

Agency: TEST
 Username: TESTUSER Active: Y
 Name: TEST NMN USER
 Initials: TNU Email: test.user@hcs.state.or.us
 Title: TEST USER Phone: 503-983-2104
 Roles: INTAKE , MANAGER , VIEW , ADMIN , REPORT Edit Roles
 Modules: E2C2 , ENERGY , FISCAL , WEATHERIZATION

Last User Activity

Login: 08-06-2013 11:41 AM by TESTUSER
 Account Edit: 08-06-2013 01:56 PM by TESTUSER
 Role Edit: 08-27-2013 09:08 AM by ██████████
 Action Edit: 08-27-2013 09:08 AM by ██████████

Disable User Edit User
 Disable User/All Modules

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-16: User View screen.

Possible Disabled User

IMPORTANT NOTE: If there is a possibility that a user might have been previously granted access to OPUS but a search results indicates no match, follow these steps:

1. Reference the procedure 'User Search'. In 'Search Results', if a specific user's name does not appear, click the boxes "Show Active Users Only" and "w/Rights to This Module", removing the 'Checkmark' then click 'Search (reference Figure 7-17).

These steps will allow an agency's users to appear regardless what module the user has permission to work in and it will show all users who have been disabled. To reactivate a disabled user, reference the 'Reactivate a User' section listed below.

Agency: OHCS User: TESTUSER
 Timeout: 19:55 Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Version 3.1.7T

User Search

Search Parameters

Login Name

First Name e.g. John

Last Name e.g. Smith

E-mail e.g. bob@yahoo.com

Agency

Show Active Users only

w/ Rights to This Module

Search

If no results, you can create a **New User**

Search Results

First Name	Last Name	Login Name	E-mail	Agency Name
RONALD	TOUB	<i>Login names have been blocked</i>	ronald.toub@state.or.us	OHCS
BRENT	HOLMES		brent.holmes@hcs.state.or.us	OHCS
KERRI	HAWORTH		Kerri.Haworth@state.or.us	OHCS
BRENT	HOLMES		brentholmes2@gmail.com	OHCS
EARL	RUTLEDGE		john.rutledge@state.or.us	OHCS
CHRISTOPHER	SHOOPMAN		chris.shoopman@state.or.us	OHCS
TEST	USER		test.user@hcs.state.or.us	OHCS
LIEM	NGO		liem.ngo@state.or.us	OHCS
JAMES	MCDONALD		James.mcdonald@hcs.state.or.us	OHCS

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-17: Searching for users, Active users and rights to the module screen.

2. If there are no matches found in the database, a manager can create a new user.

User New

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

Setup:

On the 'User Search' screen.

1. Using the left Nav Bar, under 'User', click 'New' (reference Figure 7-18). The 'User New' screen will appear next (reference Figure 7-18A).

OPUS Weatherization

Agency: OHCS

User: TESTUSER
Timeout: 19:30
Log Out

Client Program Hist Management Reports Help

Version 3.1.7T

Search
User
Kit

User
View
New
Edit User
Edit Roles

User Search

Search Parameters

Login Name

First Name e.g. John

Last Name e.g. Smith

E-mail e.g. bob@yahoo.com

Agency

Show Active Users only

w/ Rights to This Module

Search

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-18: User Search – New User screen.

The screenshot shows the 'User New' screen in the OPUS Weatherization system. At the top left is the OPUS Weatherization logo. To its right, it displays 'Agency: OHCS', 'User: TESTUSER', and 'Timeout: 19:30'. A 'Log Out' button is located to the right of the timeout. Below this is a navigation menu with tabs for 'Client', 'Case Management', 'Management', 'Reports', and 'Help'. On the far right, there is the Oregon Housing and Community Services logo and the text 'Version 3.1.7T'. On the left side, there is a search bar and a list of options: 'Agency', 'APC', 'Program', 'User', 'User', 'View', 'New', 'Edit User', and 'Edit Roles'. The main content area is titled 'User New' and contains a 'User Information' form. The form has the following fields: 'User Name' (required), 'First Name' (required), 'Last Name' (required), 'Middle Name' (optional), 'Initials' (required), 'Title' (optional), 'Email' (required), 'Phone' (required) and 'Ext.' (optional), and 'Agency' (required). A 'Save' button is located at the bottom right of the form and is circled in red. At the bottom of the page, it says 'Data Classification: 2' and 'Oregon Housing and Community Services ©'.

Figure 7-18A: User New screen.

Type or select (*all fields marked * are required*).

- User name. **Note:** Refer to the User name and password requirements link.
- First name.
- Last name.
- Middle name or initial (optional).
- Initials.
- Title.
- Role - includes the "Permission Levels" by screen.
- E-mail.

OHCS communicates regularly via e-mail. OPUS Temporary Passwords are sent automatically via email. OPUS Broadcasts are via e-mail along with announcements.

Make sure the e-mail address is correct. **OPUS Broadcasts are announcements from OHCS stating something is wrong or something is being worked on, updated or fixed. OPUS Broadcasts are done on 'URGENT' basis only. Read all OPUS Broadcast.

- Phone and Extension if applicable.
- Agency.

Click the 'Save' button to save The User View screen will appear next.

User View

The 'User View' screen allows a manager to view or edit information on an individual user and to view 'Roles' (permission) level a user has been assigned (*reference Figure 7-19*). To edit roles, follow the instructions listed below.

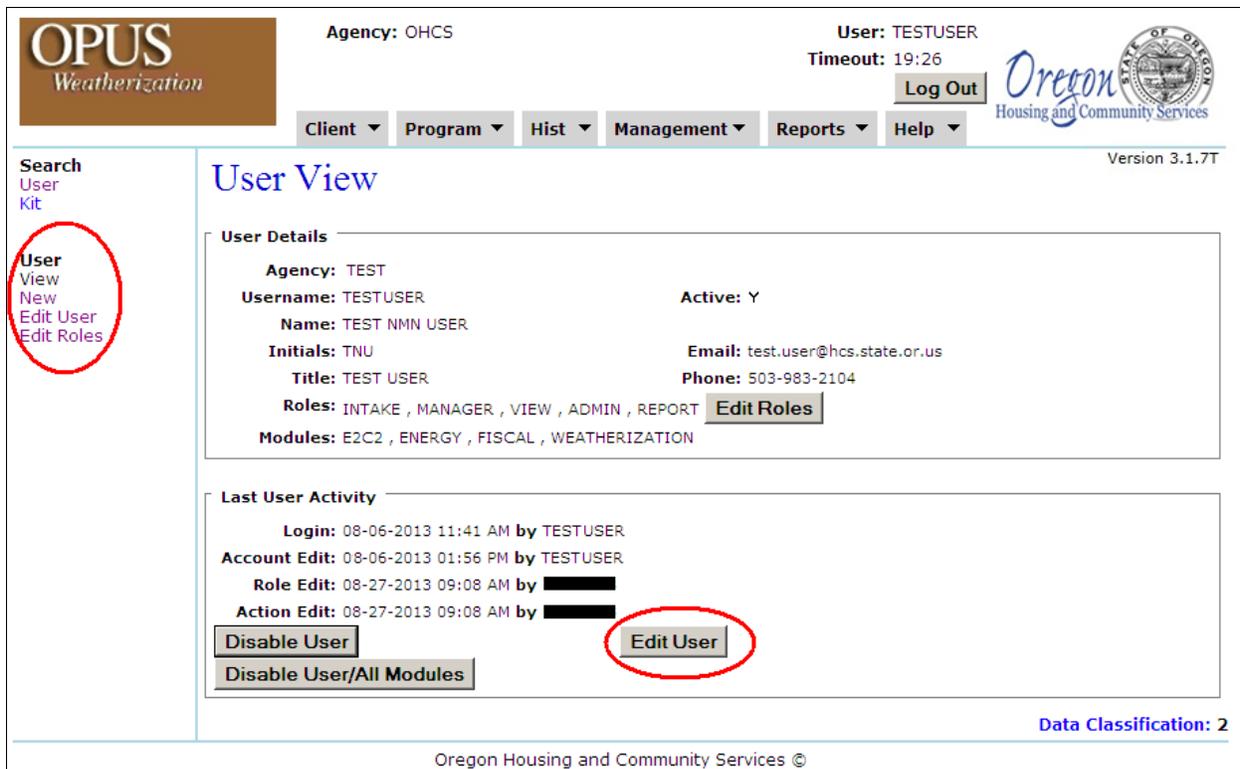


Figure 7-19: User View – to Edit screen.

User Role Edit

The 'User Role Edit' screen allows a manager to grant or adjust the roles and actions a user has access to on an as needed basis, per screen or assigned task. To edit user roles and actions, follow the steps below.

Note: There are two steps issuing roles. The first step is establishing permissions for a user. For each role there is a default set of actions, which initially allows permissions to all the actions associated within the specific role.

Setup:

1. On the 'User View' screen, click on the 'Edit Roles' link in the Left Nav Bar or click the 'Edit Roles' button (*reference Figure 7-19, above*). The 'User Role and Action Edit' screen will appear.
2. On the 'User Role and Action Edit' screen, select the user role(s) button for designed role the user will have access to. If you select the check box preceding the user role button, all permissions for that role will automatically populate under Actions. (*reference Figure 7-20A, below*) then click the 'Update' button to apply the roles and actions. The 'User Role and Action Edit' screen will appear again.

If the user needs all the default permissions associated with a given role, there is no need to do any further steps.

At times, there might be permissions within a specific role that a user does not need access to perform. To customize permissions within a role, follow the instructions below.

User Action Edit

Setup:

1. On the 'User Role and Action Edit' screen. Click on the desired 'User Roles' button' (i.e. Admin, Intake, Manager, Report and View) (reference Figure 7-20A). The corresponding actions for the selected role will populate under the 'Actions' section of the screen (reference Figure 7-20B)

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 19:47 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.0.0T

User Role and Action Edit

User Information
Name: TESTNMN USER
Username: TESTUSER

User Roles

Role	Description
<input checked="" type="checkbox"/> ADMIN	Weatherization Admin
<input checked="" type="checkbox"/> INTAKE	Weatherization Intake Role
<input type="checkbox"/> MANAGER	Weatherization Manager Role
<input checked="" type="checkbox"/> REPORT	Weatherization Reports
<input checked="" type="checkbox"/> VIEW	Weatherization View

Actions

<input checked="" type="checkbox"/>	WX - Client Characteristics
<input checked="" type="checkbox"/>	WX - Energy Type Labels
<input checked="" type="checkbox"/>	WX - Funding Summary Report
<input checked="" type="checkbox"/>	WX - Furnace Replacement
<input checked="" type="checkbox"/>	WX - Global Client Characteristic Report
<input checked="" type="checkbox"/>	WX - Grant Costs Report
<input checked="" type="checkbox"/>	WX - Health And Safety Job Costs
<input checked="" type="checkbox"/>	WX - Historical Furnace Replacement
<input checked="" type="checkbox"/>	WX - Historical Grant Cost Report
<input checked="" type="checkbox"/>	WX - Historical Health And Safety Job Costs
<input checked="" type="checkbox"/>	WX - Historical Quarterly Report
<input checked="" type="checkbox"/>	WX - Historical Re Weatherization Report
<input checked="" type="checkbox"/>	WX - Historical Report Main
<input checked="" type="checkbox"/>	WX - Monitor Completion Report
<input checked="" type="checkbox"/>	WX - Quarterly Report
<input checked="" type="checkbox"/>	WX - Re-Weatherization Report
<input checked="" type="checkbox"/>	WX - Reports Main
<input checked="" type="checkbox"/>	WX - Residence Change
<input checked="" type="checkbox"/>	WX - SHPO Report
<input checked="" type="checkbox"/>	WX - WX Client Report
<input checked="" type="checkbox"/>	WX - WX Job Report
<input checked="" type="checkbox"/>	WX - Zip Code Labels
<input checked="" type="checkbox"/>	WX Referral Report

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-20A: User Role and Action Edit screen – Add Roles.

2. Under the Actions section, a manager can 'Allow' or 'Deny' permissions within any specific role by selecting or deselecting the check box preceding the action. Permissions are decided by the OPUS Administrator and Manager(s) of the agencies. Once permissions have been assigned, click the 'Update' button. This step needs to be repeated for each specific role that requires permission within it to be edited (reference Figure 7-20B).

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 19:47 [Log Out](#)

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Search User Kit

User View New Edit User Edit Roles

User Role and Action Edit

Version 3.0.0T

User Information

Name: TEST NMN USER
Username: TESTUSER

User Roles

- ADMIN** - Weatherization Admin
- INTAKE** - Weatherization Intake Role
- MANAGER** - Weatherization Manager Role
- REPORT** - Weatherization Reports
- VIEW** - Weatherization View

Actions

- WX - Client Characteristics
- WX - Energy Type Labels
- WX - Funding Summary Report
- WX - Furnace Replacement
- WX - Global Client Characteristic Report
- WX - Grant Costs Report
- WX - Health And Safety Job Costs
- WX - Historical Furnace Replacement
- WX - Historical Grant Cost Report
- WX - Historical Health And Safety Job Costs
- WX - Historical Quarterly Report
- WX - Historical Re Weatherization Report
- WX - Historical Report Main
- WX - Monitor Completion Report
- WX - Quarterly Report
- WX - Re-Weatherization Report
- WX - Reports Main
- WX - Residence Change
- WX - SHPO Report
- WX - WX Client Report
- WX - WX Job Report
- WX - Zip Code Labels
- WX Referral Report

Update

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-20B: User Role and Action Edit screen – Customized Actions.

Disable User

When users are disabled, the user's name is basically cancelled. The user's name stays in the database in an inactive list and never really deleted. To locate a user that could have been deleted, refer to 'Possible Deleted User' previously discussed.

To cancel a user account, a manager will click the 'Disable User' or 'Disable User/All Modules' button (*reference Figure 7-21*). For user(s) who have access to multiple modules, it's best to use 'Disable User/All Modules'.

The screenshot displays the OPUS Weatherization interface. At the top, the agency is identified as OHCS, and the user is TESTUSER with a timeout of 19:26. A navigation menu includes Client, Program, Hist, Management, Reports, and Help. The main content area is titled 'User View' and shows details for the user TESTUSER, including their name, initials, title, roles, and modules. Below this, the 'Last User Activity' section lists recent actions like login and account edits. At the bottom of the activity section, two buttons are circled in red: 'Disable User' and 'Disable User/All Modules'. The footer includes the Oregon Housing and Community Services logo and version information.

OPUS
Weatherization

Agency: OHCS User: TESTUSER
Timeout: 19:26 Log Out

Client ▾ Program ▾ Hist ▾ Management ▾ Reports ▾ Help ▾

Search
User
Kit

User
View
New
Edit User
Edit Roles

User View

Version 3.0.0T

User Details

Agency: TEST Active: Y
Username: TESTUSER
Name: TEST NMN USER Email: test.user@hcs.state.or.us
Initials: TNU Phone: 503-983-2104
Title: TEST USER Edit Roles
Roles: INTAKE , MANAGER , VIEW , ADMIN , REPORT
Modules: E2C2 , ENERGY , FISCAL , WEATHERIZATION

Last User Activity

Login: 08-06-2013 11:41 AM by TEST USER
Account Edit: 08-06-2013 01:56 PM by TESTUSER
Role Edit: 08-27-2013 09:08 AM by ██████████
Action Edit: 08-27-2013 09:08 AM by ██████████

Disable User Edit User
Disable User/All Modules

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-21: User View Delete User screen.

Reset User Password

Setup:

1. Using the 'User View', click the 'Edit User' button or the 'Edit User' link in the Left Nav Bar. The 'User Edit' screen will appear (*reference Figure 7-22*).

The screenshot displays the 'User View' interface for the OPUS Weatherization system. At the top, the agency is identified as 'OHCS' and the user as 'TESTUSER'. The interface includes a search bar, a navigation menu with options like 'Client', 'Program', 'Hist', 'Management', 'Reports', and 'Help', and a 'Log Out' button. The main content area is divided into two sections: 'User Details' and 'Last User Activity'. The 'User Details' section lists information such as Agency (TEST), Username (TESTUSER), Name (TEST NMN USER), Initials (TNU), Title (TEST USER), Email (test.user@hcs.state.or.us), and Phone (503-983-2104). It also includes an 'Edit Roles' button. The 'Last User Activity' section shows a list of events: Login (08-06-2013 11:41 AM by TESTUSER), Account Edit (08-06-2013 01:56 PM by TESTUSER), Role Edit (08-27-2013 09:08 AM by [redacted]), and Action Edit (08-27-2013 09:08 AM by [redacted]). Below this list are buttons for 'Disable User', 'Disable User/All Modules', and 'Edit User'. The 'Edit User' button in the activity list is circled in red. In the left navigation bar, the 'Edit User' link is also circled in red. The page footer includes 'Oregon Housing and Community Services ©' and 'Data Classification: 2'.

Figure 7-22: User View screen.

2. On the 'User Edit' screen, check box "Reset password". A manager would use this feature if a current user forgot the password or if an agency has a policy to reset passwords for routine reasons (*reference Figure 7-23*).

OPUS Weatherization Agency: OHCS User: TESTUSER Timeout: 19:41 Log Out Oregon Housing and Community Services

Client Program Hist Management Reports Help Version 3.0.0T

Search User Kit

User View New Edit User Edit Roles

User Edit

Fields marked with * are required.

User Name: TESTUSER

First Name: TEST *

Last Name: USER *

Middle Name: NMN

Initials: TU *

Title: TEST USER

E-mail: test.user@hcs.state.or.us *

Phone: 503-983-2104 * Ext

Agency: TEST *

Reset Password? Save Changes

Data Classification: 2

Oregon Housing and Community Services ©

Figure 7-23: User Edit – Reset Password screen.

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

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Appendix

Contained in this section are examples of required forms and documentation associated with the OPUS Weatherization Module.

A	OPUS Weatherization Forms	243
	User Policy, Responsibility and Code of Ethics	A-1
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B	OPUS Documentation	
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USER POLICY, RESPONSIBILITY, & CODE OF ETHICS

For Oregon OPUS Data Collection System

USER POLICY

In order to meet the requirements of various Federal and state agencies, the Oregon OPUS data collection system is a collaborative statewide effort among helping agencies to document client-level needs and characteristics through a coordinated system that aggregates common information at the agency, community, and state levels

OPUS is a tool that can also assist agencies in focusing services and locating alternative resources to help homeless and low-income persons. Agency staff may use the Client information in the system to target services to the Client's needs.

OPUS is an entirely web-based system -- hosted on a central statewide server -- coordinated by the Oregon Housing and Community Services Department. The system is accessed via the Internet by provider sites offering shelter, housing, and supportive services to homeless and low-income individuals and families.

Participating Agencies shall have rights to the data pertaining to their clients that they directly enter into the OPUS.

All OPUS Users are required to be trained prior to using the system.

All OPUS Users are required to read, understand, and sign the *User Policy, Responsibility, & Code of Ethics* form prior to using OPUS.

All OPUS Users are required to have read and understand their Agency's Privacy Notice.

The Agency and Users understands that informed client consent is required before any basic identifying client information is searched, accessed or entered into OPUS.

Data Entry

Data necessary for the development of aggregate reports of services, including services needed, services provided, referrals and Client goals and outcomes should be entered to the greatest extent possible. However, all agencies are required to complete mandatory data fields identified in the OPUS system.

Restricted Information

Information, including progress notes and psychotherapy notes, about the diagnosis, treatment, or referrals related to a mental health disorder, drug or alcohol disorder, HIV, or AIDS, and domestic violence concerns shall **not** be shared with other Participating Agencies through OPUS. This information should also not be entered in any open notes sections in the Oregon Statewide OPUS system.

07/08/2005

Page 1 of 4

USER RESPONSIBILITY

Your User ID and Password give you access and authority to use the OPUS system and creates an audit trail. Initial each item below to indicate your understanding and acceptance of the proper use of your User ID and password. Failure to uphold the confidentiality standards set forth below is grounds for immediate termination of User privileges and you may be subject to further penalties.

Please initial each item below to indicate your acceptance and understanding of the user responsibilities below.

- _____ I have read and understand my Agency's Privacy Notice.
- _____ My User ID and Passwords must be kept secure and are not to be shared with anyone, including other staff members. I must take all reasonable means to keep my Password physically secure.
- _____ I understand that my access to OPUS is limited to my designated work site unless I am given expressed written consent of the Agency Administrator to access the system from other specified locations.
- _____ I understand that the only individuals who may view information in OPUS are authorized users who have received appropriate confidentiality training. OPUS users must respect the privacy and hold in confidence all information obtained in the course of their use of the system.
- _____ I may only view, obtain, disclose, or use information from OPUS that is necessary to perform my job.
- _____ Client information should be accessed only in order to retrieve, update, or report data relevant to a client requesting services from my agency.
- _____ If I am logged into OPUS and must leave the work area where the PC is located, I must log-off of the OPUS system or lock the PC before leaving the work area.
- _____ A PC that has OPUS open and running shall never be left unattended.
- _____ A PC that has OPUS open and running shall never be arranged so that unauthorized OPUS users may see the information on the screen.
- _____ I understand that failure to log off of OPUS appropriately may result in a breach in client confidentiality and system security.
- _____ Hard copies and downloads of information from OPUS onto a hard drive or disk must be kept secure to ensure that only appropriate agency staff has access.
- _____ When hard copies and downloads of OPUS Client information are no longer needed, they must be properly destroyed as described in your agency's policies.

**PRINT
NAME**

AGENCY

- _____ If I notice or suspect a security breach, I must immediately notify my Agency Administrator for OPUS and my Executive Director or the OPUS System Administrator.
- _____ I understand that I am responsible for reporting any system malfunctions or “bugs” that I notice or suspect to the Agency Administrator and other appropriate system support staff.
- _____ I understand that in the event that I am terminated or leave my employment with this agency, my access to OPUS will be deemed revoked. I covenant and agree not to attempt to access OPUS upon termination of my employment with this agency.

OPUS User Signature

Date

OPUS Agency/System Administrator Signature

Date

Agency Executive Director Signature

Date

PRINT
NAME _____

AGENCY _____

USER CODE OF ETHICS

- A. Oregon OPUS Users must treat Participating Agencies with respect, fairness and good faith.
- B. Each Oregon OPUS User shall maintain high standards of professional conduct in his/her capacity as an Oregon OPUS User.
- C. All Oregon OPUS Users shall endorse and maintain the client’s rights related to privacy and confidentiality and shall adhere to the *OPUS Policy Notice to Consumers of Services*.
- D. The Oregon OPUS User has primary responsibility for his/her Client(s).
- E. The Oregon OPUS Users will not misrepresent its client base in the Oregon OPUS system by entering knowingly inaccurate information (i.e. User will not purposefully enter inaccurate information on a new record or to over-ride information entered by another agency.)
- F. Discriminatory comments based on race, color, religion, national origin, ancestry, handicap, age, sex, and sexual orientation are not permitted in the Oregon OPUS system
- G. The User will not use the Oregon OPUS system with intent to defraud the federal, state, or local government or an individual entity; or to conduct any illegal activity.

I understand and agree to comply with all the statements listed above.

OPUS User Signature

Date

OPUS Agency/System Administrator Signature

Date

Agency Executive Director Signature

Date

Weatherization Assistance Program Application Form

The following is a step-by-step description of the information requested on the application form for weatherization assistance.

See Application Example on pages A-8 & A-9.

1. **Applicant's Legal Name:** Print applicant's full legal name as listed on Social Security card.
2. **Agency Name:** Print agency's name.

Client Information Section (*Begin with the applicant.*)

3. **Name:** Print full legal name for each member of the household.
4. **Birth-date:** Enter date of birth for each household member (Month/Day/Year).
5. **SSN/SYSID:** Enter the social security number for each household member.
(For Weatherization a social security number is not required; however, it is strongly encouraged.)
In cases where issues inhibit applicants from providing a social security number, OPUS will issue a unique client identification number to assure non-duplication of services. Examples include:
 - Unavailable to custodial guardian/parent
 - Domestic Violence
 - Newborn SSN
 - Adult applying for SSN with letter of SSN application
6. **Social Security Number Code:** (*See SSN code on reverse side of the application.*)

All Demographic Data Must Be Requested For Each Household Member—*However, services will not be denied for refusal to provide demographic information.*

7. **Language:** Enter the applicable language acronym for each household member. (*See Language Code on the reverse side of the application.*)
8. **Gender:** Enter gender code. (*See Gender Code on the reverse side of the application.*)
9. **Ethnicity:** Enter ethnicity code. (*See Ethnicity Group Code on the reverse side of the application.*)
10. **Race:** Enter the applicable race acronym for each household member. (*See Race Code on reverse side of application; select all race codes that apply.*)
11. **Oregon Tribes:** Enter Oregon Tribes code. (*See Oregon Tribes codes on the reverse side of the application.*)
12. **Education:** Enter the acronym of the highest level of education completed for all Household Members ages 23-60 years old. (*See Education Code on the reverse side of application.*)

13. **Disability:** Enter disability code. *(See Disability Code on the reverse side of application.)*
14. **Veteran:** Enter veteran code. *(See Veteran Code on the reverse side of application.)*
15. **Homebound:** Enter homebound code. *(See Homebound Code on the reverse side of application.)*
16. **Non-Cash Benefits:** Enter the non-cash benefit(s) code. *(See Non-Cash Benefits Code on the reverse side of application; select all non-cash benefits codes that apply.)*
17. **Phone:** Enter a primary telephone number for the household. When available enter secondary phone number(s).
18. **Mailing Address:** Enter the household's mailing address.
19. **Physical Address:** Enter the household's physical address. (Please note if different from the mailing address.) The physical address on the application must match the address on the utility bill receipt.
20. **Dwelling Type:** Circle the correct dwelling type.
21. **Residence Status:** Circle the correct residence type.
22. **Primary Heat:** Circle the correct heat type. Under "Primary Heat Type" indicate the letter beside your heat selection.
23. **Applicant's Legal Name:** Print applicant's full legal name as listed on Social Security card.
24. **Agency Name:** Print agency name.
25. **Utility Information**
Utility Provider: Enter the names of all the utility providers (i.e. Pacific Power, NW Natural Gas, Portland General Electric, etc.).
Account Numbers: Enter the corresponding account number for each utility account.
26. **Reference:** Insert letter next to name which corresponds to the client *that is* employed. Enter employment information for all household members 18 and over who are employed.
Employment: Name of employer, address city, state, zip and phone number. Do not use P.O. boxes, use actual work location address. *(This information may not be required at each agency. Staff should verify policies with local agency coordinator).*
27. **Income Source/Income Reported:** Insert letter that corresponds to the client who receives income. Enter specific income source. *(See Income Reported codes on the reverse side of the application.)*
28. **Income Type:** Enter income type code. *(See Income Type codes on the reverse side of the application.)*
29. **Income Verification: Enter income verification code from the reverse side of the application.** *Required documentation may vary across agencies. Staff should verify guidelines and policies with their local weatherization assistance coordinator.*
30. **Comments:** Any and all special circumstances must be documented.

31. Calculating Income: Determination of income is based on all household income before any deductions (this is known as gross income).

Income must be calculated using data from one of the following three time periods: one (1) month, three (3) months, or twelve (12) months. Use the time period that is the most beneficial for the household. Count past income, do not project forward.

These time periods also apply to applicants who are self-employed.

Amount: Household income is based on verification. If the household has more than one employer, list each individually and then total the income in the Annual Amount column.

Frequency: Enter how often the household receives income. Verification must be collected for at least one month of income, but may be collected for the quarter or year. Use the amount that is most beneficial to the applicant /household.

Income verification timelines may vary across agencies. Staff should verify policies with their local weatherization assistance coordinator.

Annual amount: Total calculated income for the year (i.e. monthly amount multiplied by twelve (12) for annual income, Quarterly amount multiplied by four for annual income).

NOTE: Income that exchanges hands within a household is not counted.

Recertification: Household must be income certified a minimum of once per program year. **Local agencies may require recertification more often.** However, recertification policies must be applied consistently across all households. Income certification can be used across both LIHEAP/OEAP program within the same program year.

32. Utility Release: If any information is needed from the utility, the account holder must sign the utility release.

33. Signatures: The applicant signs and dates the application after they have reviewed the information and have read the applicant disclaimer. The applicant must also identify if they are 1) the account holder, 2) the applicant, and/or 3) an authorized representative and circle the correct response(s). The intake worker then signs and dates the application, and a copy of the application is given to the client.

Applicant Legal Name: **1** _____ Agency: **2** _____
 (Last, First)

**OREGON HOUSING AND COMMUNITY SERVICES
 WEATHERIZATION APPLICATION**

Revised: 08-09-2012

Circle One Household Type: M S SPM SPF EXF 2P COH **Acronym Code List - See Reverse Side of Form**

Ref.	Legal Name	Total Number in Household:		SSN/SYSD	SSN Code	Language	Gender	Ethnicity (see codes on reverse side)	Race (see codes on reverse side)	GR Type	Education	Disabled	Veteran	Homeland	Non-Cash Benefits
		Birthdate	SSN/SYSD												
A	3	4	5		6	7	8	9	10	11	12	13	14	15	16
B															
C															
D															
E															
F															
G															
H															

PHONE

HOME Phone is the SAME for entire Household (except as ref at right side)
 HOME Phone: **17** _____

Mailing Address is the same for all Clients in Household
MAILING ADDRESS: _____

Mailing is SAME AS Physical Address (Except where noted below)
 Street Address: **18** _____

City: _____ State: _____ Zip: _____ Apt. or Space #: _____
 PO Box #: _____

ADDRESSES

Only if different than Mailing Address (written below)
PHYSICAL ADDRESS: _____

Street Address: _____ Apt. or Space #: _____
 City: **19** _____ State: _____ Zip: _____

HH Comments: _____

Type of Dwelling (Circle below): 20	Residence Status (Circle below): 21	Type of Heat (Circle below): 22
H Single Family House M Multi-Unit (2-4) U Multi-Unit (Over 4)	R Rent (Heat not included) E Rent (Heat included) O Own S Subsidized Housing with Utility Allowance (Heat not included) U Subsidized Housing (Heat included) W Subsidized Housing without Utility Allowance	E Electric N Natural Gas O Oil L Propane/Liquid Gas W Wood P Pellet S Solar O Other (list)

Primary Heat Type: _____ Enter value from list above

Acronym Code List

Acronym Codes - Extracted from reverse side of the Weatherization Application form.

SOCIAL SECURITY NUMBER CODE

Full Full Social Security Number/Sys ID
DK Don't Know or Don't Have
RF Refused

LANGUAGE

AM American Sign
AR Arabic
C Chinese
E English
F Farsi
H Hmong
J Japanese
K Khmer
KO Korean
LA Laotian
M Mien
MA Mayan Group
O Other
R Russian
RU Romanian
S Spanish
V Vietnamese
DK Don't Know
RF Refused

GENDER

F Female
M Male
O Other
DK Don't Know
RF Refused

ETHNICITY

NH Non-Hispanic/Non-Latino
H Hispanic/Latino
DK Don't Know
RF Refused

RACE

AA African-American
AS Asian
AI American Indian/Alaska Native
NH/PI Native Hawaiian/Pacific Islander
WH White
DK Don't Know
RF Refused

DISABLED

N No
Y Yes
DK Don't Know
RF Refused

OREGON TRIBES

BP Burns Paiute Tribe
CO Coquille Tribe
CC Cow Creek Band of Umpqua Indians
CTC Confederated Tribes of the Coos, Lower Umpqua and Siuslaw Indians
CTU Confederated Tribes of the Umatilla Indians
GR Confederated Tribes of Grande Ronde
KT Klamath Tribes
S Confederated Tribes of Siletz
WS Confederated Tribes of Warm Springs
OT Other Oregon Tribes
MT Multiple Oregon Tribes
DK Don't Know
RF Refused

EDUCATION

NO No Schooling Completed
PK Preschool
K Kindergarten
1 1st Grade
2 2nd Grade
3 3rd Grade
4 4th Grade
5 5th Grade
6 6th Grade
7 7th Grade
8 8th Grade
9 9th Grade
10 10th Grade
11 11th Grade
12 12th Grade – No Diploma
GED GED
HSD High School Diploma
HSN High School No Diploma
HS Head Start
PS Post Secondary – No Degree
AA Associates Degree
BA Bachelor's Degree
MA Master's Degree
PHD Doctorate Degree
OPD Other Grad/Professional Degree
ATC Advanced training Certificate
SAC Skilled Artisan Certificate
DK Don't Know
RF Refused

Income Frequency

E Every other Week
M Monthly
O One Time
Q Quarterly
T Twice-A-Month
W Weekly
Y Yearly

VETERAN

N No
Y Yes
DK Don't Know
RF Refused

HOMEBOUND

N No
Y Yes
DK Don't Know
RF Refused

HOUSEHOLD TYPE

M Married No Children
S Single
SPM Single Parent Male
SPF Single Parent Female
EXF Extended Family
2P Two Parent
COH Co-Habitants

Income Verification

AL Award Letter
BS Bank Statement
CM Case Mgr/Worker
CPS Check Pay Stub
CD Court Docs
FMP Fax/Mail/Postcard
FSRN FSRN
FSUP FSUP Verified
G Grant
HI Historical Increase
MI Misc. Income
P Phone
PF Previous File
SA State Agency
SD Self-Declaration
SEWS Self-Employment WS
S Student
SWS Student WS
TANF TANF Information
TXF Tax Forms W2 1099
UED Unemployment Documents
UM Update Mail Out
WP Wage Printout
OM Other Method
VP Verification Pending

Income Reported

N No
Y Yes
ZIS Zero Income Statement
DK Don't Know
RF Refused

NON-CASH BENEFITS

SNAP Supplemental Nutritional Assistance Program
OHP Oregon Health Plan
MCARE Medicare Health Insurance Program
WIC Special Supplemental Nutrition Program for Women, Infants and Children
VAMS Veteran's Administration Medical Services
TNFC TTANF Child Care Services
TNFT TANF Transportation Service
TNFO OTHER TANF-Funded Services
PRA Section 8, Public Housing, or Other Ongoing Rental Assistance
OHI Other Health Insurance
OS Other Source
TRA Temporary Rental Assistance
NONE Receiving No Non-Cash Benefits
DK Don't Know
RF Refused

Income Type

AD Adoption
AL Alimony or other Spousal Support
AN Annuities
CG Cash Grant
CS Child Support
DB Death Benefit
E Education
FC Foster Care
GA General Assistance
GT General Assistance Tribal
IN Private Disability Insurance
I Interest
OS Other Source
PP Private Pension
PS Property Sale
SS Social Security Income
SSI Supplemental Security Income
SSDI Social Security Disability Income
SE Self-Employment
TANF Temporary Assistance for Needy Families
TF Trust Fund
U Unemployment Insurance
VDP Veteran's Disability Payment
VP Veteran's Pension
W Wages
WC Workers Compensation

OPUS Privacy Posting/Notice



**THIS NOTICE DESCRIBES HOW INFORMATION ABOUT YOU
MAY BE USED AND DISCLOSED AND
HOW YOU CAN GET ACCESS TO THIS INFORMATION.**

PLEASE READ IT CAREFULLY.

Effective Date: _____

Our Duty to Safeguard Your Protected Information

(Agency Name) collects information about who accesses our services. When we meet with you we will ask you for information about you and your family and enter it into a computer program called OPUS. OPUS is used by other helping agencies throughout the state that provide services to homeless and low-income persons. We are required to protect the privacy of your identifying information and to provide you a copy upon request of the *Privacy Notice to Consumers of Services* that explains in greater detail how, when, and why we may use or disclose any information you may give us.

We are also required to follow the privacy practices described in this Notice, although Oregon Housing and Community Services reserves the right to change our privacy practices and the terms of this Notice at any time. You may request a copy of the new notice from any OPUS Agency.

How We May Use and Disclose Your Information

OPUS partner agencies will use disclosed information, as appropriate, to process and administer requests for assistance. OPUS partner agencies may share limited information about the people they serve with other OPUS partners working to provide services. This information is used to improve and coordinate services to your household and reduce the number of forms you will need to complete at participating agencies.

We use and disclose collective information for a variety of reports. We have a limited right to include some of your information for reports on homelessness and low-income households and services needed by those populations. Information that could be used to tell who you are will never be used for these reports. We will not turn your personal identifying information over to a national database. Please review the *Privacy Notice to Consumers of Services* for details.

Your Rights Regarding Your Information

- You have the right to have corrections and supplementation's made to your record.
- You have the right to request a copy of the *Privacy Notice to Consumers of Services*.

Updated 07/08/05

Anuncio sobre el Aviso de Privacidad de OHCS OPUS



ESTE AVISO LE INFORMA COMO SU INFORMACION PUEDE SER USADA Y DEVELADA Y COMO USTED PUEDE TENER ACCESO A ESTA INFORMACION

POR FAVOR LEA CUIDADOSAMENTE

Fecha de vigencia: _____

Obligación a Proteger Su Información Personal

_____ (Agency Name) compila información de los que usan y obtienen acceso a nuestros servicios. Durante nuestra junta con usted, le pediremos datos sobre su hogar y su situación que serán capturados en un programa de computación llamado OPUS. OPUS es usado por otras agencias aliadas en el estado que proveen servicios a personas y hogares de bajos recursos. Estamos obligados a proteger la privacidad de su información de identificación y a proveerle una copia, si lo pide, del *Aviso de Privacidad de OHCS OPUS para los Beneficiarios* que explica en detalle cómo, cuándo, y porque podemos usar su información o develar cualquier información que usted nos provea.

Estamos también obligados a seguir las prácticas de privacidad descritas en este **Aviso; la Agencia de Vivienda y Servicios a la Comunidad (OHCS) se reserva el derecho de cambiar nuestras prácticas de privacidad y los términos de este aviso en cualquier momento.** Usted puede pedir una copia del nuevo aviso a cualquier agencia en OPUS.

Como Podemos Usar y Develar Su Información

Las agencias aliadas en OPUS pueden develar su información según sea apropiado para el procesamiento y administración de solicitudes a una variedad de programas de asistencia para la autosuficiencia. Las agencias aliadas en OPUS pueden compartir información *limitada* sobre sus beneficiarios con otros aliados en OPUS que trabajan para proveer y abogar por servicios. Esta información es usada para mejorar y coordinar servicios para su hogar y reducir el número de formularios que usted necesita completar con las agencias participantes.

Nosotros usamos y develamos información colectiva para una variedad de reportes. Tenemos derechos limitados para incluir parte de su información en reportes sobre pobreza y hogares de bajos recursos y los servicios que esta población ocupa. Para más detalles, por favor revise el *Aviso de Privacidad de OHCS OPUS para los Beneficiarios*.

Sus Derechos sobre su Información

- Usted tiene el derecho de que se hagan correcciones y añadiduras a su historial
- Usted tiene el derecho a pedir una copia del *Aviso de Privacidad de OHCS OPUS para los Beneficiarios*

OPUS Data Collection System

Privacy Notice to Consumers of Services

THIS NOTICE DESCRIBES HOW PRIVACY INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. **PLEASE REVIEW IT CAREFULLY.**
THE PRIVACY OF YOUR PERSONAL INFORMATION IS IMPORTANT TO US.

OPUS Data Collection System Recommended Privacy Notice

OPUS was developed to meet a data collection requirement made by the United States Congress to the Department of Housing and Urban Development (HUD) and the Department of Health and Human Services (HHS). Congress passed these requirement in order to get a more accurate count of individuals who are homeless or low-income and to identify the need for and use of different services by those individuals and families. We are working to assist the State of Oregon in meeting the goal set by Congress by collecting statistical information on those who use our services and report that information to a central data collection system.

We will use the information you provide to process and administer your application for assistance. Many agencies in this area also use OPUS. The information you provide to us may be shared with other OPUS participating agencies. The information we collect and share includes: basic identifying demographic data (e.g., name, address, birth date, phone number, SSN, ethnic origin, familial status, financial data), the nature of your situation, and the services and referrals you receive from our agency.

Sharing information with OPUS and other agencies helps us to better understand the number of individuals who need services from more than one agency. This may help us to meet your needs and the needs of others in our community by allowing us to develop new and/or more efficient programs. Sharing information through OPUS can also help us make referrals more easily, often with less paperwork for you.

Maintaining the privacy and safety of those using our services is very important to us. Information gathered about you is personal and private. We collect information only when appropriate to provide services, ensure compliance with assistance requirements, manage our organization, or as required by law. Within the limits of the law, your record of services received will only be shared through OPUS with funding agencies including Oregon Housing and Community Services who administers the OPUS database.

CONFIDENTIALITY RIGHTS

This agency has a confidentiality policy that has been approved by those with authority to do so. This policy follows all HUD and HIPAA (Health Insurance Portability and Accountability Act) confidentiality regulations that are applicable to this agency, including those covering programs that receive HUD funding for homeless services (Federal Register/Vol. 69, No. 146 – Emergency Shelter Grant, Supportive Housing Continuum of Care, Home TBA, ...*List Programs*), and those covered under the HIPAA privacy and security rules which govern confidential health information such as the diagnosis, treatment, of a mental health disorder, a drug or alcohol disorder, an AIDS/HIV condition or a domestic violence situation (*List Programs*).

Records about substance abuse, physical and mental health, HIV, and domestic violence will not be shared through OPUS.

This agency generally is restricted to using or disclosing personal information from OPUS to the following circumstances:

- To provide or coordinate services to an individual,
- For functions related to payment or reimbursement for services.
- To carry out administrative functions including but not limited to legal, audit, personnel, planning, oversight and management functions;
- Databases used for research, where all identifying information has been removed.
- Contractual research where privacy conditions are met.
- Where a disclosure is required by law and disclosure complies with and is limited to the requirements of the law. Instances where this might occur are during a medical emergency, to report a crime against staff of the agency, or to avert a serious threat to health or safety.

YOUR INFORMATION RIGHTS

As a client receiving services at this agency, you have the following rights:

- ***Correction of your record.*** You have the right to request to have your record corrected so that information is up-to-date and accurate to ensure fairness in its use.
- ***Agency's right to refuse inspection of an individual record.*** Our agency may deny you the right to inspect or copy your personal information for the following reasons: (1) information is compiled in reasonable anticipation of litigation or comparable proceedings; (2) information about another individual other than the agency staff would be disclosed; (3) information was obtained under a promise of confidentiality other than a promise from this provider and disclosure would reveal the source of the information; (4) information, the disclosure of which, would be reasonably likely to endanger the life or physical safety of any individual; or (5) this disclosure of information is otherwise limited by law.
- ***Harassment.*** The agency reserves the right to reject repeated or harassing requests for access or correction. However, if the agency denies your request for access or correction, you will be provided written documentation regarding your request and the reason for denial. A copy of that documentation will also be included in your client record.
- ***Grievance.*** You have the right to be heard if you feel that your confidentiality rights have been violated, if you have been denied access to your personal records, or you have been put at personal risk, or harmed. Our agency has established a formal grievance process for you to use in such a circumstance.

HOW YOUR INFORMATION WILL BE KEPT SECURE

Protecting the safety and privacy of individuals receiving services and the confidentiality of their records is of paramount importance to us. Through training, policies and procedures, and software we have done several things to make sure your information is kept safe and secure:

- OPUS uses multiple security protections to prevent unauthorized access.
- Only trained and authorized individuals are intended to enter or view your personal information.

- Your name and other identifying information will not be contained in OPUS reports that are issued to local, state, or national agencies.
- Employees and volunteers receive training in privacy protection and agree to follow strict confidentiality standards before using the system.
- The server/database/software is designed to only allow authorized individuals access to the information.
- The server/database only sends encrypted data – an Internet technology intended to keep information private while it is transported back and forth across the Internet. Furthermore, identifying data stored on the server is also encrypted or coded so that it cannot be recognized.
- The server/database exists behind a firewall – a device meant to keep hackers/viruses/etc. away from the server.
- The main database will be kept physically secure, meaning that it is designed so that only authorized personnel should have access to the server / database.
- Database administrators support the daily operation of the database. Administration of the database is governed by agreements that limit the use of personal information to providing administrative support and generating reports using aggregated information. These agreements further insure the confidentiality of your personal information.

WHAT IS INFORMED CONSENT?

- Confidential information about you and confidential services provided to you cannot be given to anyone other than permitted by law without your giving informed consent. In order to be able to give informed consent:
- You should be told about the benefits, risks, and available alternatives to sharing your information (KNOWLEDGE).
- You should be able to reasonably understand this information including the potential risks, benefits, options, and consequences (UNDERSTANDING).
- You should not be forced or pressured into a decision. The choice you make should be your decision (VOLUNTARY).

BENEFITS OF OPUS AND AGENCY INFORMATION SHARING

Information you provide us can play an important role in our ability and the ability of other agencies to continue to provide the services that you and others in our community are requesting.

Allowing us to share your basic identifying demographic data, even in the absence of other information, results in a more accurate count of individuals and the services they use. The security system is designed to create a code that will help protect your identity on the system. A more accurate count is important because it can help us and other agencies:

- Better demonstrate the need for services and the specific types of assistance needed in our area.
- Obtain more money and other resources to provide services.
- Plan and deliver quality services to you and your family.
- Assist the agency to improve its work with families and individuals who are in need.
- Keep required statistics for state and federal funders (such as HUD and HHS).

- Promote coordination of services so your needs are better met.
- Make referrals easier by reducing paperwork.
- Avoid having to repeat as much information to get assistance from other agencies.

RISKS IN SHARING INFORMATION

- While the OPUS system has multiple security layers in place and was designed to promote better services for those who are in need, there are risks you should consider before accepting services:
- Could there be physical harm or other negative consequences to you or members of your family if someone within an OPUS participating agency knew that they could find you from the information shared with other participating OPUS agencies?
- Could there be physical harm or other negative consequences to you or members of your family if someone within an OPUS participating agency found out you sought help, particularly if you or your children have experienced domestic violence, sexual assault, stalking, or child abuse?
- Are there others who may work or volunteer at other OPUS participating agencies who you may not want to have access to your information or to know you are seeking services?

OUR LEGAL DUTY

We are required by applicable federal and state law to maintain the privacy of your private personal information within the limits of that law. We are also required to give you this notice about our privacy practices, our legal duties, and your rights concerning your private personal information. We must follow the privacy practices that are described in this notice while it is in effect. This notice takes effect immediately, and will remain in effect until we replace it.

We reserve the right to change our privacy practices and the terms of this notice at any time, provided such changes are permitted by applicable law. We reserve the right to make the changes in our privacy practices and the new terms of our notice effective for all private personal information that we maintain, including private personal information we created or received before we made the changes. Before we make a significant change in our privacy practices, we will change this notice and make the new notice available upon request.

You may request a copy of our notice at any time. For more information about our privacy practices, or for additional copies of this notice, please contact us. Notwithstanding the foregoing, the Agency makes no warranties, expressed or implied, with respect to the confidentiality of personal information.

PRIVACY NOTICE AMENDMENTS: The policies covered under this Privacy Notice may be amended over time and those amendments may affect information obtained by the agency before the date of the change. All amendments to the Privacy Notice must be consistent with the requirements of the Federal Standards that protect the privacy of consumers and guide OPUS implementation and operation.

